
Chapter 8: Case Study: A Transformation Programme

Introduction

In the previous chapter, we discussed transformation programmes, and the selection of individuals for the key roles within them. This task is more difficult when a major programme is outsourced to a consultancy. The consultancy may lack fine-grained knowledge of the host organisation's culture, and a successful model in one environment may be hard to replicate in another.

These points were particularly relevant when a consultancy I was associated with was asked to lead a large IPTV-VoD (Video-on-Demand) programme for a European company called JDicom. The relevant technology was discussed in chapter 3. The consultancy had had little to do with JDicom previously, all we knew about it was that it was in the networking and content distribution business, and that it was eager to exploit new opportunities for voice and video over IP to residential customers. The company was multinational in its staffing, but the working language was English.

JDicom was used to running programmes, but typically only one major programme at a time. As it had grown, and as the rate of industry innovation had increased, it was having to run more priority programmes in parallel. Senior management had decided that a more formal project management discipline was required, and that an outside project management consultancy might be the way to import it. The team to go in was comprised of two colleagues, George and Peter, and myself.

George had been assigned the Programme Director role. He had previously been a senior operations executive with a major carrier. He was a big, burly man with a generally genial, paternal manner, although a certain directness sometimes featured in conversation with him, where another might have chosen a softer way. Put George in a programme management situation and it was all business: the bonhomie was still there for situations he approved of, but if you irritated him by failing to meet your obligations George could crank up a level of intimidation you would not believe. Later, in meetings, I would see George turn his powers of persuasion on recalcitrant project managers, and it was as if an implacable black wall occupied the room, horizon-to-horizon and extending far up into space. This wall of coercion would slowly advance to enclose the hapless individual - resistance truly was futile.

George was familiar with the Myers-Briggs scheme, as discussed in the previous chapter, and later in the project he was happy to confide to me that he was an INTJ. I have to say that I was quite surprised to hear this, as he seemed to me to be a Guardian type: I would have guessed ISTJ.

However, when you take a Myers-Briggs assessment, the facilitator typically tells you the type which the tests have indicated and asks you whether you agree. If you disagree, you are invited to say what type you think you are, and that is the type which is then taken as definitive. From a formal psychometric point of view, this is not a good policy, although it clearly helps user acceptance in client practice. I recalled that when I was working in Nortel, I had believed myself to be INTJ and had indignantly corrected test supervisors who had scored me as INTP. Reading the type descriptions naively, I saw INTPs as detached bystanders, while INTJs got things done. I saw myself as a go-getter and change-agent, very much exemplifying the Nortel results-oriented culture. It was only later I realised that any type can get results, in their own way, if that's what is required, and that personality classification is looking at something far more profound. I had acquired a deeper understanding of what kind of person I was, and the *way* I responded to the challenges of the culture around me.

George was interested in ideas and proud of his academic accomplishments, although he would not have described himself as an intellectual. I would guess that, contra Jungian presumptions of necessary bimodality, George was probably on the S-N boundary. Just speculation on my part.

My other colleague, Peter, was physically smaller and thinner, and much more the classic intellectual. Where George projected visceral authority, Peter brought understanding and penetration, a powerful motivation for order and detail, plus a relentless determination to get to the bottom of all issues which might affect programme success. Peter was not familiar with the Myers-Briggs scheme and had not taken any assessments. To be honest, he was not that interested, but once the typology was outlined, he readily agreed he was probably a Rational INTJ.

In their self-contained manner, tough-minded approach and propensity to organise anything which moved, George and Peter matched each other perfectly. Peter produced ideas, and George supplied common sense. They both majored in conviction.

I was the odd one out here and I wondered why I had been asked to join the team. As a Rational INTP, I was useful for ideas and strategy, and I happened to know quite a bit about IT from previous work and assignments. Being **P** rather than **J** registered a more laid-back, diplomatic and transactional attitude to

getting things done. But in the more robust language of programme management, however, I was probably too *passive*, too prone to *go native*, too inclined to *see the other person's point of view* and therefore a *weak sister* when it came to cracking the whip and enforcing project discipline. Guilty as charged, Sir! I have never pretended to be a project or programme manager of the old school. JDIcon's problems looked interesting, but how my own role would work out was anyone's guess.

The First Meeting

After a few days to prepare, we were invited to a meeting at the client's site which brought the stakeholders together and kicked the programme off. As the meeting progressed, we came to the following view: there was clearly momentum already for this project, as work was already being done, particularly with JDIcon's hardware, software and security infrastructure partners. On the other hand, there was no overall mechanism for securing a cohesive solution, for bringing the various projects together and for allowing effective overall management.

This, of course, was not a surprising conclusion as it was precisely why we had been brought in. We made sure that we sent around a sheet of paper so we could get everyone's name, role and contact details, and subsequently scheduled a series of meetings with all the key players: architects, relevant line managers and the assigned project managers, to begin our detailed engagement with the programme.

Over the next few weeks, we began to learn more about JDIcon. Its style of work was 'osmotic': coordination was achieved by cross-silo involvement in each of the projects. The upside of this approach was the presence of a diversity of skills at each meeting, and the rapid diffusion of information around the organisation. The downside, in addition to the size of the meetings, was that everyone of any skill had their time sliced between many different working-groups, and was involved in endless meetings. Apparently, attempts to install more process were seen as harbingers of the dreaded 'bureaucracy', which would be anathematic to JDIcon's start-up culture.

We have seen the evils of bureaucracy in many carriers, (cf. chapter 5), where innovation is all-but-impossible, and never fast, so we enormously sympathised. However, we *do* need process and accountability, and we do need to free up some space for work. As the saying goes, you either meet or you work. After consultation with our senior management contacts, we therefore put forward a proposal for a new, cleaner project organisation and reporting structure. We recommended that the programme should be divided into a number of projects, each headed up by a project manager accountable to a central Programme Office which we would constitute ourselves.

Programme Start-Up

After two or three week's of interviews and document reviews, we reached that most difficult of times, the point where you try to take charge. JDCom was a most polite culture, and although everyone was incredibly busy, we had had little problem in getting into people's diaries when it came to interviewing them. But soon we sensed our honeymoon period was coming to an end, and it was time to add some value (figure 1).



Figure 1. The consultants

Our recommendation was accepted so we went ahead and established the Programme Office, comprising George as Programme Director, Peter, a JDCom finance guy and myself. Wednesday was our first *Programme Review Meeting* where we allocated the whole day to meet with the project managers from each of the programme's project for an hour each. They had each been asked to prepare a brief report with the following headings.

- Milestones reached
- Remaining milestones to end of programme
- Achievements since previous review
- Issues / Concerns / Risks to future milestones

- Decisions Required
- Approvals / Authorisations required

At this stage we were not expecting too much, as many projects had barely got going, and planning was in its infancy.

First up was Aubrey from the Marketing project. Previously, this project had been stalled, as Aubrey had been totally focused on the JDIcom network evolution programme. As a result, he had had little time to worry about our IPTV concerns. However, over the last week, a lot of work had been done and the whole area was now shaping up.

Next was Charles, one of the principal technical architects, who specialised on the network side and was closely involved with the network division people. The temporary project manager for the Technical Design Authority (TDA) was away, and the new one had not yet arrived. Charles was the classic architect: smart, laid back and accommodating. He had the slightly world-weary air of someone who has seen all the stupidity in the world, has given up the futile task of fighting it, and is content to navigate around idiocy and do what he can for progress. God knows what he thought of us. Charles was helpful, but didn't fit our needs for what a project manager was meant to be doing in this slot.

The Set-Top Box project manager was Keith. He was a thirty-something no-nonsense guy who George took to instantly. This had something to do with the fact that Keith had completed his form and showed every sign of understanding what it meant to work to a plan. While the STB area looked in-shape, we had been warned repeatedly that it has the potential to sit on the critical path and cause delays. The box is complex and is the focus point for delivery of the entire service. Often problems only surface late in user trials, when change is difficult and time very short.

The network representative failed to arrive. I had predicted this, as it was always going to be unlikely that the network division's Technical Director, who is being pulled a thousand ways, would have made the two hour trip from his office to our Programme Office location just to emulate a project manager. The network division was pre-occupied with their expansion programme, and had not been able to assign a project manager to us. Another problem we will have to deal with.

Harold visited us next. Harold leads the Broadcast and Systems project which is tasked to put in place the MPEG encoders which pull channel content into IP and feed it into the network. On the VoD side, they

will acquire and integrate the VoD servers and asset management systems, and integrate everything with the Conditional Access System. And then there are the changes to IT systems, both scheduling, EPG, advertising systems and the more traditional business support systems involving CRM, field-force management and billing. The IT impact at this stage is completely unknown.

Harold confirmed that they had started plan development for the broadcast infrastructure head-end, and that it didn't look good. If they were to do the programme the conventional way, they could miss the launch by months, not weeks. They were working on it.

Our final project is Business Readiness. This is Customer Operations plus whatever else is needed to get to launch. We talked to the responsible executive, who, like Aubrey from Marketing, is totally absorbed with the network expansion programme and hasn't given two thoughts to our IPTV-VoD programme up to this point. We don't get mad, we stress our need for a dedicated project manager and he promises to help. Someone has already been allocated, apparently, and will attend the next meeting.

Finally, we meet with Nick, a suave and suited lawyer who represents JDicom's legal division to us. This covers a number of areas: customer contracts, regulation, rights, contacts with suppliers, lawsuits, etc. We are told that the area of most relevance to our programme is the question of rights: specifically the right to distribute channels across a streaming IP network, and the rights to place material on Catch-Up TV and VoD servers.

Our series of meetings ended around 5 p.m. We felt that at least we now had a calibration of where people were at.

Friday saw our second governance structure, the Programme Management Board. This is the somewhat grandiose title for a weekly 90 minute meeting of the Programme Office with all the project managers together. The intention is for us to report back on progress, and for the meeting to discuss and resolve issues which cut across multiple projects and which cannot easily be sorted out bilaterally. We presented slides we had put together after Wednesday's PRM, and George gave a pep talk about the need to expedite planning and the need for each project to make an assessment of its state-of-readiness and its level of risk.

So with Wednesday's PRM and Friday's PMB, that's the formal side of governance. In an organisation which was used to running programmes this way, we would simply start things up, get everyone used to

this style of reporting and oversight, and after a few weeks we would expect a ‘programme under management’. However, JDIcom is not that company. The culture here, as mentioned previously, is much more organic. People are used to multi-tasking and networking to achieve their objectives. From this perspective, formal procedures can look a lot like mindless bureaucracy, adding a layer of meetings and reporting which is just deadweight.

This view is not stupid. Many media companies, as well as start-ups, work effectively in this informal manner. However, given the number of high-priority projects now running concurrently in JDIcom, a degree of formality is vital if the aggressive dates are to be hit. Our challenge is to add a framework of discipline, structure and formality in a way which helps the project, not hinders it, and to sell the case to the people whose help we will need to make it work. It is not easy.

The Executive Board

The following week brought the first meeting of the IPTV-VoD Executive Board which brought together project leaders and relevant senior executives from JDIcom under the chairmanship of the COO. George, as Programme Director, attended from the Programme Office, and we prepared the meeting.

The Executive Board is the third leg of the programme governance structure, along with our innovations of the PRM and the PMB. Executive Boards are a venerable JDIcom institution and their function is well-understood: to allow senior executives to get a snapshot of progress, and to allow issues to be definitively resolved.

The issues here included the number of TV and radio channels to be provided on day one of service launch, the problems of hitting the very aggressive launch dates, and the challenge of scoping how much work needed to be done in the IT space.

Talking to a number of people afterwards about the meeting (which I did not attend) I was struck by how the same meeting can be reported in such a diversity of incompatible ways. Did the IT people get beaten up badly, or was it merely an action item competently addressed and then moved on from? Was it really more of an issues-oriented workshop rather than a senior management progress review meeting? Did senior staff really micromanage down to junior staff levels of detail, and if so, was this really a bad thing? It is impossible to say.

The 'Difficult' Project Manager

Arthur first came on the scene as a new project manager. His boss had mentioned his recruitment, and had spoken very highly of him, so we were intrigued to meet with him.

Arthur came into our room and we did the introductions. Both George and Peter then had to leave, but as I had nothing planned, Arthur and myself were able to talk for a further hour. It was nothing special - I explained the project, and he talked a little about his previous career. My take-home view? Arthur was bright, opinionated, slightly prickly but definitely someone we could do business with (probably a Rational ENTJ).

Over the next week, my colleagues begged to differ. I heard that he was difficult and uncooperative, that he was a baleful and negative influence on the programme. I could not join in with these sentiments, and was genuinely puzzled: why did my colleagues take against Arthur so? Arthur himself remained oblivious of the impression he was making, just seeming puzzled that a certain tension existed between himself and the Programme Office.

The scales fell from my eyes on the next occasion of the weekly Friday PMB meeting. All the project managers were there, along with some of their managers - quite senior people. George was chairing, and I noticed that even when he was giving them a hard time, the JDCom managers were quietly respectful of George, trying to help him and themselves in pushing the programme along.

Arthur's approach was somewhat different. George would suggest something, as Programme Director. Arthur would disagree, and, in a manner which might appear to some as condescending, he would point out the drawbacks and suggest some improved notion. (This, by the way, is typical extraverted Rational behaviour). If he expected George to instantly see the merits of this and adopt his idea forthwith, he was to be disappointed. Instead, George bristled.

Later that day mulling over these events, I had an abrupt realisation. The truth was that Arthur was *insubordinate*: not at all in the insolent sense of the 'lad', deliberately flouting authority, but in the manner of the intellectual, who does not even see that the authority dimension exists. By failing to understand and accept the authority relationship between himself and George, he was actively undermining George's authority. No wonder George was taking it badly, Guardians care deeply about that sort of thing. I resolved to confront Arthur for coaching the next time I saw him.

Monday morning arrived, and my good intentions felt a lot less compelling as I approached the office shortly after 8 a.m. It is difficult to raise these issues with people: much more dangerous than merely having technical discussions. As I walked by his desk, Arthur's coat was there, but not himself. I left a note. A few minutes later, he turned up and with some trepidation I ushered him into an empty meeting room.

We agreed right away that relationships between my colleagues and himself were strained, and needed to be improved. Arthur knew there was a problem, but couldn't understand why.

"Arthur, who do you work for?"

Arthur looked nonplussed at this question. He knew that I knew the answer and named his boss.

"Yes," I said patiently, "who else do you work for?"

Arthur looked puzzled and I had to prompt him.

"George, right? He's the Programme Director, and you are a project manager on the programme. So in programme terms, you report to him and he's your boss. It's a matrix thing."

"Yes, yes of course. I know that."

"Well, you know it and you don't know it. That's the problem."

Arthur felt the need to defend himself.

"What is George's problem? I am trying to help, I listen to what he says and I try to respond constructively and to give him the benefits of my experience and ideas."

"Yes, Arthur, that's very apparent. However, the problem is not the content of your ideas - which are good - not even your readiness to contribute - also good. The problem is with your attitude. To put it bluntly, you are insubordinate."

At this point, Arthur showed the classic symptoms of denial. He had heard the words, but did not process their meaning. His reply was classically inappropriate.

“Well, what does George want? If he doesn’t want to hear my ideas, fine. I’ll stop giving them.”

We continued a dialogue of the deaf for several further minutes. I reiterated the point that this was not a question of an intellectual relationship, but of appropriate authority-behaviour - knowing your place, really. However, getting nowhere, I had to change tack.

“Arthur, I’ve tried the sophisticated stuff, but it’s getting us nowhere, so let me try the tabloid way. Suppose this programme was the mafia, and George was the Godfather, the capo di tutti capi. Then you would be taken out and shot for showing no respect. Now do you get it?”

Arthur showed no evidence that he believed this parable to be appropriate to his own situation, but he did promise to go away and think about it. I left the meeting pessimistic about the results: changing behaviour is very difficult, requiring a conscious and sustained personal belief in the necessity to change. I was not sure that Arthur had really bought the argument - only time would tell.

Theory X vs. Theory Y

Let’s try to frame this episode. Theory X vs. Theory Y has something to say here. Do we apply firm hierarchical control to whip the work-shy layabouts into shape and keep them from straying? Or do we provide the necessary environmental conditions so that self-active problem-solving individuals can work to optimal effect?

JDIcon looks to me like a Theory Y company. People are smart, capable and hard-working. They know how to collaborate and how to use the line structure to get decisions made when they need them. Their senior managers behave in the same way, often being drawn into quite detailed problem-solving when their attention is grabbed.

Programme management, as George and Peter see it, is most definitely Theory X. People are assumed to be wandering from the script, and George’s job is to extract definite dates, precise descriptions of deliverables and most importantly, accountability from individuals who are presumed to be unwilling to give it, and then to hold them to account. Echoes of the stern father with wayward children.

It would be easy to roll your eyes and treat George's approach as a holdover from the dinosaurs. Surely we are all Theory Y now - how else do you manage knowledge workers? We all know that everything is provisional until it achieves reality, and that prematurely imposing a control grid on future events just chokes off the creativity and flexibility which is needed for success.

And yet ... to deliver this programme to date will require conscious management of the whole process. The programme cannot just grow organically, like a plant at the leading tip of the shoot, bending around obstacles as it encounters them. Extracting milestones for the duration of the programme, with dates and dependencies, gives us a benchmark solution architecture for the programme. Then it can be managed.

And to hold the whole thing together arguably needs someone like George: forceful, authoritarian, charismatic even. Someone who can get your attention, someone you will feel uneasy saying 'no' to. Almost all of the JDCom managers get it, which is why they adopt their role placements as prescribed in Theory X, and use their skills to manage our expectations. And hence my discussion with Arthur.

Did my talk with Arthur have any success? He did try to shape up, but you cannot change character. The team came to see him as 'bureaucratic', someone who was happy to organise his own area of responsibility, but who was essentially detached as regards other areas of the programme. We wanted someone who would be prepared to pro-actively drive any part of the programme if it was necessary to meet their own objectives, not simply manage within the confines of their own project. Perhaps we were unfair. Perhaps we projected onto Arthur some of our unvoiced concerns about our own performance.

The Networks People

We had endless problems getting any attention from the network division. They pleaded lack of resources, and intense concentration on their new network expansion programme. The effect on us was: no plan, no key milestones, no dedicated project manager and therefore a non-existent project.

We proposed a dedicated project manager, a specific individual we knew, but this was rejected on the basis that his CV was too operational, and did not show skills in the network design area. We thought the rejection came a little too quickly.

The following week found me at the network division's main site. After the usual delays, the meeting started at 5.30 p.m. - those were the kinds of hours programmes in JDCom were keeping those days. I was meant to be meeting the network technical director, a small, intense man named August, with an

introduction made by Victor, the executive who had been our main contact thus far. However, Victor showed no inclination to go away.

The meeting room in which we sat seemed too big for the three of us. We were all placed at one end of a very long table, close by the door. I began by describing my own background and indicated the problems we were having in integrating the network project into the overall IPTV-VoD programme. I indicated I was here to help overcome the difficulties and to find out exactly what extra resources they might need. I even cracked the standard gag (“I’m from the Government, I’m here to help you”). I was not prepared for what happened next, as Victor cut across my explanations.

“It’s impossible for us to help you when you give us no information about what you want.”

“Victor, that’s not really the case. It’s true that marketing started late, but they *have* made rapid progress recently, and the requirement for IPTV and VOD is now quite anchored down, as ...”

“Well,” interrupted Victor, “that’s not what I’m hearing from the executives I talk to. It seems there’s hardly two of them who have the same opinion.”

I struggled to continue. “The Executive Board is authoritative, and it’s chaired by the COO. You are a member, and had you been at the first meeting, you would have ...”

But Victor would not be deflected. “I have seen *no* signed-off requirements yet from your programme, and when I talked to the CEO about it I’m afraid I got a rather different story. So I would say to you, get your requirements sorted out before you ask us for specific help. We made it quite clear that we could not do your programme until we had completed our network upgrade.”

I tried again. “The IPTV-VoD dates are quite clear, and if we can’t make them, we need to go back to the executive with dates when we *can* deliver, or with a scaled-back proposition that can hit their required dates. As far as I can see, putting QoS and multicast for IPTV over your network would not be too difficult, since the equipment you are ordering will have all the capabilities.”

At this point, Victor and August exchanged knowing glances at my naiveté, explaining mock-patiently the difficulties in configuring, tuning and testing these functions.

The conversation, if it could be called that, continued with attacks on the our programme's apparent inability to exactly specify the demographics of intended customers down to the zip-code level, the inability to specify POP locations for VoD servers and their power and heat-dissipation requirements, and the administrative load imposed by our all-too-numerous programme meetings.

I once had a girlfriend whose tactic in arguments was to keep changing the subject before I had a chance to properly engage with it. As the goal-posts were abruptly moved time after time, I had felt like a dog being yanked on a lead, or a bull vainly charging a flourished cape ... over and over again.

Talking to Victor, I was back there again, wrong-footed and gamely ineffectual. With the wisdom of years, I could now better recognise what was going on. I was doggedly assuming that the conversation was about how to resolve all these problems. My conversational partner, however, had no desire at all to cooperate: it was merely an exercise in stone-walling.

August had scarcely got a word in edgeways until, at 6.40, Victor had run out of steam. With his leaving for an evening engagement, I was able to snatch a few minutes with August, who briefly outlined a number of issues with upgrading his network expansion programme to accommodate our programme. His plan had no slack in it for a TV service overlay activity, there were issues in the access network, which was running on leased circuits not dimensioned for IPTV, and he was resource-constrained in terms of people and skills.

I left the networks building with the view that this was a showstopper for delivering against the current target dates, and that the level of non-cooperation shown meant that we had no obvious means of resolving the situation. In programme management, you never give up: there is always a move you can play. But this did not seem to admit of any fast or even effectual response.

We are rescheduled

Events continued to move fast, and two days later we were surprised and relieved to hear that the Executive Board had decided to delay our programme. The initial planning work from the head-end project had already indicated that this was going to be necessary, and network division's situation had led to an identical conclusion. With the new dates, the programme had now become achievable. As I absorbed the news, I wondered whether Victor had known this all along, and had seen me as just another middle manager: in the dark and sent on an impossible mission.

On Friday, I paid a second visit to the network division. This time, I met with August and two of his designers, with no Victor in sight. The meeting was extraordinarily productive. It turned out that the network division people knew essentially nothing about our programme. Once I had had a chance to brief them, we were able to agree some 'go-forwards plans'. Networks were intending to recruit a project manager dedicated to IPTV over the next two to three weeks, and that person would ensure divisional resources would be allocated to our programme and the work aligned. With the new date, they were sure they could now meet our needs. A good result.

The final outcome was anticlimatic. There was an internal reorganisation in JDIcom and our sponsor moved role. With the new date, the programme didn't seem quite so urgent, and the need for our involvement seemed less compelling. On that basis, our mission with JDIcom was accomplished and we moved on to other work.

Conclusions

In retrospect I think we were too authoritarian. The IPTV-VoD programme was truly very volatile, in an environment of other programmes which we did not control, and of which we had little visibility. By trying to anchor things down early and hard, we created almost impossible pressures on our project managers - pressures which we often didn't understand because they were not immediately visible to us.

Being more politically aware would, however, have been difficult. We were not employees and were not part of the extended social network. People were very busy and would not have welcomed us wandering around, randomly engaging them in conversation. JDIcom tried to run one programme in an orthodox manner in a sea of other programmes - some of higher priority - which were running more informally. This was always going to be a difficult play to get exactly right.

However, JDIcom's fundamental problem has not gone away. Their astonishing ability to innovate is based on hyper-activism on the part of their staff, and a bottom-up culture of best-practice and improvisation. Their good programme managers use good methodologies, leveraged from earlier successful programmes, the less good ones seem less in control but there are no standards as such. It seems to me a non-trivial problem to develop a programme management template for JDIcom which would exactly suit them. It would have to leverage their creativity, flexibility and intense social networking, while adding the necessary degree of process standardisation and formality. And the same dilemma would apply to any other successful, creative and innovative organisation.

I don't believe our team ever really understood that point. We imported a model which would have worked with people who were less educated and more used to being led, but which clashed with the culture around us. The problems probably outweighed any benefits we brought in the end. I am conscious that in saying this I speak as the non-programme-manager. I suspect my colleagues would have very different views.