The Ultimate Program Manager's Toolkit

We've created this Toolkit so you can have an easily referenceable copy of our complete content series on Best Practices for Project Managers and our complete content series on Project Management Risks that contribute to Failure.

Not only this, but because this is supposed to be useful to you (and not merely information), we're including specific tools to help you both implement these Best Practices and avoid or fix Failure-inducing Scenarios.

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Overview of Project Management Best Practices

A systematic process to delight your government customer

How to Become the Incumbent Contractor, Gain Task Orders & Bid Opportunities

The most important principle to become the incumbent contractor, protect your Federal Program, and gain new tasks orders & bid opportunities is to delight your customer.

But how can you do this, besides the obvious answer of delivering your Federal Program as contracted, on time, and within budget?

What if you had a systematic & effective process to delight your Government Customer?

We have perfected such a process, and because of it our CPARS scores are unheard of in the industry. We call this process The Four Best Project Management Practices to delight your customer:

- **Communicate**
- **Remind**
- **Report**
- **Serve**

Reading that list might seem like we are recommending bland, generally "good ideas" when it comes to making your customers happy. However, don't be fooled; not only are these general terms for specific and effective processes to follow (crafted from out of decades of experience), if you actually follow them it will make delighting your customer the natural result of your actions, rather than a nice ideal to aim for.

In this series, we flesh out these four best practices, providing you Program Management templates, tools, checklists, and step-by-step strategies along the way to not only make you a better project manager / program manager, but help your company become the Federal "contractor of choice" within your Agency.

Each of these best practices will take work to implement, but we've made it far easier. We've developed a secret sauce that results in delighted customers and ongoing, successful programs. This proprietary process - using these project management best practices - have brought results that speak for themselves:

- Extremely high CPARS scores
- New task orders worth $1,000,000+
- Personal requests from Contracting Officers to submit a bid for a new RFP

Communicate: daily processes to keep projects on task and build data for more efficient project managementIf your Federal program is struggling or there's simply a lot of competition, this series will be your guide to a place of stability, where your Agency or Department would never consider replacing you with an upstart contractor.

Communicate: daily process to keep projects on task and build data for more efficient project management

The First of Four Best Project Management Practices

Meetings can literally be the bane of your project.

Without meetings, your project will suffer a dire lack of communication. As a program manager you will never know which tasks are languishing because your teammates are stuck (both the teammates in your company and at your Government customer).

With meetings, you can waste a lot of time, kill momentum, and discourage your teammates who will wish they could be getting something "real" done.

You need a systematic way to **transform your meetings into fast, enjoyable, and results-driven processes**.

So how do you put this best practice, *Communicate*, into action?

Enter Scrum. Want to make getting your Scrum summaries from your team easy?

How to run a Scrum: Fast, Enjoyable, Results-driven Meetings

Gather your team together at the same time and same place each morning. Here's the simple agenda. Start by answering these three questions aloud for the team:

- What am I working on?
- What did I accomplish yesterday?
- What is getting in my way or impeding project progress?

When finished, call on the next person, and they will answer these same questions. When finished they will call on the next person, and so forth until every person has shared.

There is a certain cadence and discipline this will create in the meeting. It's not as repetitive as it may seem, and the answers should only provide basic details about the task or problem. The goal with Scrum is for the project leader/program manager to identify:

- Status Check - learn if is everyone on task or working on the appropriate task
- Blocks - discover problems preventing task completion
- Dependencies - see which tasks are being held up due to other tasks being incomplete

When the Scrum is finished, you will be able to:

- Know what each teammember is working on
- Know what problems each member faces, and what you need to fix
- Reassign new tasks to teammembers as needed (especially if their current task is blocked)

A Story of How We Used Scrum Ourselves

Synergetics recently introduced a daily Scrum process to a project that we are leading for a Federal customer. Leading a system consolidation effort and leveraging existing customer infrastructure and staff can be tricky. In this case, we were assigned Federal associates that were not yet adequately trained in the modern technologies and methodologies that we were building. In order to meet an aggressive deadline and keep the project on track, we needed to increase the frequency of meetings. It was important to be respectful of staff time by setting and sticking to short duration meetings. It was also important to maintain a standardized format for each meeting by asking teammembers to simply answer three questions:

- What have you accomplished since the previous meeting (Scrum)?
- What are you working on?
- What is blocking you from making progress?

Answering these questions on a daily basis built project-level awareness across the team. It improved our collaboration, creativity, and our program manager's ability to triage problems and delegate resources to fix them.

The project's risks and issues were ongoing and dynamically changing. During our daily Scrum, the program manager was able to capture all of these issues and record them, putting them in a Weekly Status Report. By logging the risks and issues, the program manager was able to:

- Keep the project moving forward by ensuring every task was being completed
- Keep our Federal customer informed about the project status along the way

We've provided a Weekly Status Report Template for you to be able to easily put this practice into action. In this Template is a slide dedicated to Risks and Issues for you to record.

How to Extract Even More Results Using SCRUM in Your Program

Over time, if you are consistently running Scrums each day, you will start gathering valuable data that will enable you to continually improve task completion, quality, and project timelines. Here's what you will learn if you keep a record of your Scrums and regularly analyze that record:

- How effective is each team member at completing tasks: How fast do they complete tasks? How often have blocks that they could have solved themselves? etc.
- Quantitative information to report employee performance back to your customer, especially when managing members of their staff
- Compare estimated time needed for project tasks/milestones to actual time, and determine trends or conditions that might have contributed to the discrepancy
- Knowing the actual time it is taking to complete tasks, you will be able to accurately forecast timelines in the future

The ability to accurately forecast project timelines is extremely valuable. Imagine being able to answer your customer with simple exactitude why the current milestone in the project has taken longer than forecast, with an understanding of the trends or conditions that have led to the timeline and how you will address those issues.

Moreover, imagine if you could forecast accurate timelines for your project milestones. If you can accurately forecast your project's timelines, you can far more better forecast your project's costs. The value of being able to forecast a project's costs can hardly be overstated - if you can accurately forecast costs, it will enable you to:

1. Deliver your current program within budget
2. Create more opportunities for profitability / reduce causes of loss in your program
3. Accurately and competitively bid (& win) new programs

As you put together new bids, your understanding of your own costs will become more accurate - which in-turn enables you to offer more competitive pricing. The better you understand operations on the day-to-day scale, the less risk you take when creating and pricing a proposal on the large scale, and at this point it becomes one big step easier to win bids.

Finally, here are some high-level questions to answer as project manager (and these are the exact questions you can use to fill out your Weekly Status Report):

- Are we on-track overall?
- If not, can we start to mitigate some of the lag or reduce the overall time it takes?
- How does the next project milestone fit into the bigger picture, and what would need to happen for us to be on-track and on-time based on our initial estimates?

To summarize, this best practice for program managers--Communicate--is simply using a form of Scrum to enable your team to effectively and systematically communicate with one another and with your customer, keeping projects on time and moving forward.

This is a practice well worth doing, and to make it easy for you, we're offering a free Scrum Update Template. Simply ask your team to send you their weekly status in an email every Friday by noon. You get a summary of their Scrum for the week (written by them), which you can then combine. With all of your team's notes put together, 75% of your weekly deliverable is accurate and done. You will have a great record to analyze and to also create your Weekly Status Report.

Team Member Weekly

Remind: a process to keep your customer in the loop and make their job easier

A Systematic Process for creating Heroic Weekly Status Updates

The Second of Four Best Project Management Practices

Every government contract comes with a requirement to keep your customer informed about the project's status. Having this requirement is the prudent thing to do. But no quality contractor should have to be told to keep their customer in the loop.*

The trouble is, status updates are something easy to avoid. If there are problems in the project, if your program is going over budget or missing deadlines, when you give your customer a status update, you'll have to the own up to the truth. You won't be able to hide behind your credentials or past successes any more.

Allow us to therefore to revolutionize your understanding of Status Updates (as in, turn your feelings on them 180º).

Status updates are an opportunity to remind your customer that you are their hero by ultimately making them look like one. Want to make it super easy to give your customer regular, high quality status updates?

In order to take advantage of this unique opportunity, you need to be already doing a quality job of managing the project: particularly team communication, task assignment, and issues. If you aren't managing these three things well, then of course your Status Updates are not going to make you look like a hero; your customer will see you are not in control of their program.

Need to know how to systematically manage the daily communication of your project? Read our previous article on page (X), about the First of the Four Project Management Best Practices.

Being perceived by your customer as not in control of your project is the kiss of death. Instead, when you provide a Status Update, your daily team communication will have already given you the following information:

- What your team has recently accomplished
- What issues the project is facing & how they are being resolved
- What your team will be completing in the near future

Equipped with this information, you can simply plug it into a presentation template and share it with your Government Contracting Officer or any other managers you are accountable to.

Your Status Update should include:

- Significant work accomplished that week
- Significant development milestones
- Iterations, Risks, and Issues (along with date for each and current status)
- Sub-slides with more details about specific Iterations, Risks, and Issues
- Team tasks completed & current assignments
- Team focus for the coming week
- Deliverables & Approvals Timeline
- and a Project Communication Schedule

Some of this information will not change week-to-week. Arguably, the part that will change the most (the first 6 sections of your update) will already be known by you because you're using the best practice: Communicate via a team Scrum, and a lot of this information will be given to you by your team, when they send you an Team Member Weekly Status Email Sample each week.

But how should you go about creating this Status Update? We've made it easy for you. As we've promised in this blog, we're giving you a step-by-step system to delight your Government customer, as well as helpful tools to put it into action.

We've created a Weekly Status Update Template, the very template we use for our own contracts. The presentation already has instructions on how to personalize the template for your program, and will save you hours of work each week keeping your customer in the loop.

Don't forget, every Status Update you provide your customer is an opportunity to Remind them of the reason you are the contractor, and of the value they have received in working with you.

Weekly Status Report

Report: capitalize on the opportunity created by your IPRs

Turn Your Interim Progress Report into a Golden Opportunity

The Third out of Four Best Practices: Because IPRs are a Wonderful Ally

In recent years we've heard the following phrase from Government Officers: "You know, there's no value in attending IPRs anymore."

More interesting is when they said it: after leaving in the middle of a company's IPR presentation (and not long after they had stayed for the entirety of our own).

Why would they say this to us, without fear of being offensive?

Because they didn't see our presentation a your business-as-usual IPR.

In fact, they didn't see our presentation as an IPR at all, even though that's exactly what it was. How did we accomplish this, and how can you do the same?

Since when does your IPR have to be a mere relation of dry facts and figures?

- Since when is it not allowed for your IPR not be as inspirational as a TED talk, or as anticipated as Apple's yearly iPhone announcements?
- Why is it common for Government Officers to find them generally unhelpful?

Forget everything you've associated with IPRs and build your presentation from the ground up.

IPRs were created to help the Government fix struggling programs. The requirement to provide the report assumes that you as the contractor are doing poorly, and it's an opportunity for the Government to formally grill you (and if appropriate, hand out the dunce cap).

IPR presentations tend to go like this: the Program Manager from the Government Department stands in front and says, "The contract says X, Y, and Z must be done, and the contractor completed X, and Z, (and perhaps Y has a problem)."

Or if the contractor knows how to take charge, they start reading their slide deck in a monotone voice, showing their audience what the requirements of the contract are and how each requirement was fulfilled. This is the reason we hear, "Attending IPRs has no value anymore."

How do you both meet the requirement to report to your customer and the Agency directors, while also inspiring them and giving them a reason to enjoy being there?

While there are certain principles to follow to achieve a successful IPR presentation (see 8-Point
IPR Checklist for a checklist of these principles to follow), it actually starts before you plan the presentation. The first principle of a successful IPR presentation starts with the approach your company takes in contract fulfillment and delivery.

Most contractors see program requirements as an ending point – hit those requirements and you're doing your job and the customer will be satisfied. If that is the company culture for program delivery in which you find yourself, then that is what you will be able to say in your IPR: "The contract said for us to do X, so we did X." If you deliver a program that aims to reach the status quo, you can expect a status quo level of approval from your customer.

To deliver an IPR that:

- Stands out
- Isn't associated with hum-drum/status quo IPRs
- Government Officers look forward to hearing
- And builds relationships with Government tech leads, PMs, and COTRS

Then you need to start with how your company approaches program management.

So what is the approach that will turn hum-drum IPR presentations into your moment to shine?

Let's answer that with a list of a principles/practices that we use in our approach to contract fulfillment.

These things make it not only easier to deliver a better program, but naturally lead to an IPR presentation that inspires.

3 Principles & Practices in Government Contract Fulfillment

1. Contract requirements are only a starting point

What the contract says to do is only a minimum acceptable requirement – if the IPR asks you to report how many hits were on the website each day, your IPR should report how many hits per day, by date, time, and location. Many contractors simply meet project tasks and reporting at the contract requirements – this isn't you. You start at the requirements, exceed them, and by this demonstrate to your customer that you care more about the program then they do. Only excellence will create excitement.

Imagine this: you're delivering your presentation and pull up a slide that gives an overview of Task A in your project. Now instead of telling your customer, "We completed Task A," you can say, "We did Task A of course, but now look at what we also did..." Suddenly, you've got their attention. They are all ears to hear about the innovation or problem solving you accomplished.

2. Know the end-user of your program (your customer's customer)

Build a relationship with the executives of the end-users, those who benefit from your program. Always be in communication with them, asking them how the program can be improved.

In between IPRs your job is to discover weaknesses & opportunities in your program, plan developments & improvements, and write the story as you go along – which leads to the next practice:

3. Keep a record of project progress

If you are using the other Project Management best practices already, you will already be on top of your program's accomplishments, problems, and opportunities. If you keep in mind and record the story of your program (problems faced and overcome, innovations discovered and implemented, etc), delivering your IPR will be as easy as telling that story. Your audience will find it as easy to listen to and to enjoy, as well.

What easier way to keep a record of your project progress all along than with a Weekly Status Report
Template By using this process, you will automatically have more interesting content to share with your customer.

Results of this Approach to Government Contract Fulfillment

What are the results of following these practices throughout the year, which turn your IPR presentation into a golden opportunity?

- Your audience will be engaged with your presentation
- You will attract attendees from other departments or agencies
- Your audience will remember and talk about you
- You will build a reputation as a quality contractor
- You will build relationships with the exact people who can give you more business

This last benefit—building solid relationships with Government officials—can also turn your IPRs from a chance for Government representatives to scrutinize you as a "the failing contractor they have to fix", to a moment where you turn your evaluators into collaborators, working as a team to discuss the program and resolve issues. Good IPRs build relationships with your customers—that is the result we aim for, and is the reason Report is the third of the Four Best Practices to delight your customer.

Here are some quotes we've received from Government customers after hearing our presentations. You can get the same:

> *"This is the best prepared IPR I've ever seen."*
>
> *"I want to go to their (Synergetics') IPR - I know I'm going see new stuff and want to know what they have to say."*

Delivering Your IPR Presentation

No matter how well you manage your program throughout the year, if you can't also nail your actual presentation, your customers might literally walk out of the room before they hear of all the great work you're doing for them.

So the logical question is, how do you actually deliver your presentation?

Can we make the presentation part easier for you?

Yes, we can - and we've created a handy tool for you:

8 Must-Dos When Preparing a Relationship-Building, Reputation-Growing IPR Presentation

As you are preparing your presentation, follow the checklist. If you're already using the principles/practices we've shared about how to approach your program and contracting as a whole, the checklist will make it easy to deliver an IPR that builds your company's reputation and eventually brings significant returns.

8-Point

Serve: consider the end-users of your product and how to grow/leverage these relationships

Get to Know & Serve Your Program's End-User

Successful Government Contracting is About Building Bridges

It may seem contradictory, but there is one scenario where greater awareness of your program can put the whole thing at risk.

As every contractor knows, most Government agencies exist in silos. In fact, each department within an agency can be a silo, resulting in a lack of communication and trust even between departments that are within the same agency.

If your Government program gets discovered at the wrong time, you might find that someone with the power of the pen from a different silo has the ability to bring your entire program and contract into question.

In the last few years, this happened to us.

We currently run a program related to business intelligence and database management. We help manage data, and make that data useful for a large number of users who need mission critical information at a moment's notice.

The program was running excellently, when out-of-the-blue a director in a silo (unrelated to our customer) discovered our program and believed it to be an unnecessary expense, and began to talk to others about axing it.

Thankfully, our program manager had already been practicing the Project Management Best Practice: Serve, else the program might have been in trouble.

What is Serve, and how did it protect our program?

Read our Case Study:
Put *Serve* in Practice **for more details.**

How often is a Government agency the actual end-user of one's program?

If you're Lockheed, perhaps you're building fighter jets in contract with the DoD, while your end customer is actually the Air Force.

If you're Pfizer, perhaps you're running clinical trials of your newest Black Plague* antibiotic for the CDC, but the ultimate beneficiaries are major hospital networks. (*Yes, it is still out there wreaking havoc!)

When we refer to this Best Practice as Serve, what we mean is that you need to also know and serve your customer's customer, the end-user. Stop knowing and serving only the steward of your program, and start also knowing and serving the “king”! In other words, successful contractors work alongside their Government customer to serve the end-user.

There are three reasons why it is of vital importance to know and serve the “king”:

- Program Awareness
- Program Protection
- Program Innovation & Expansion

The Way to Valuable Awareness

The end-user of the service or product you deliver, particularly those at the executive level, are the ones who will always find your program relevant. They are the ones who need your product or service, who are the willing buyer, and who ultimately care most about the quality of your product. Ultimately, through a relationship with the end-user you gain a channel to receive feedback & discover how to make them happy.

If your program exceeds expectations, you gain two advocates: A) your Government customer, who will talk to others about the pleasure of working with you, and B) the end-user, who will be possibly more vocal about the product they appreciate and depend upon. Verifiable, enthusiastic testimonials are the most valuable kind of awareness you can have because they lead to the next two benefits.

The Way to True Program Protection

The value of high CPARs scores and a great working relationship with your Government customer cannot be overstated. This is the relationship we've encouraged you to build in the first three Project Management Best Practices. But your relationship building must go further and deeper. You need to have a relationship with all of the stakeholders in your program, especially those who are the beneficiaries.

If the end-user sings the praises of your program, you can be certain it also makes your Government customer look good. Even if those in power (in other agencies or politicians) underestimate the worth of your program, it will be protected because both your Government customer and the end-user will come to its defense in time of need.

The Way to Program Innovation & Expansion

The third reason you need to know and serve the beneficiary of your program is because this is where ideas for program innovation & expansion come from. If the end-user isn't complaining and your program is running along smoothly, your Government customer is usually happy with the status quo. Only the end-user, the one feeling the pain of their situation, can best answer these questions:

- How can this product/service be better?
- What do you wish it didn't do?
- What do you wish this product/service could also do?

- What other needs do you have that are similar to the one this program serves?

The answers to these kinds of questions will generate the knowledge you need to innovate & expand your program. These answers reveal not only what the end-user wants and needs, but what they are willing to buy.

In approaching some of our end-users, we've discovered that it sometimes only takes minor changes to adapt our products to meet their other needs (needs that were being met by products that didn't do the job as well!). Through these relationships we've discover opportunities to help the end-users reduce cost and simplify their product mix, while expanding our program at the same time!

By knowing and serving the end-user, we also make the steward of our program (our Government customer) look very good. How? The happier the end-user is, the better feedback the Government agency will receive and the more valuable they'll be.

We're in the business of making our Government customers look good, and there is no better way to do this than by working together to serve their customers.

Remember the three major benefits to Serve & start implementing:

- Program Awareness
- Program Protection
- Program Innovation & Expansion

If you want to start or better implement Serve in your own Program Management, here are two key questions for you:

1. Is your Government agency the end-user/beneficiary of your program? If not, who is it?
2. Who are the executives and high-level stakeholders of the end-user?

Want to start practicing Serve? Our own story is a good starting point, full of practical examples. It will also share many ideas on how to effectively build a relationship with the end-user, while respecting the place your Government customer has as the steward of the program.

Case Study:

Project Management Risk Factors

Four Risk Factors That Contribute to Project Failure

A Guide to Non-technical Project Management Scenarios to Avoid or Fix

We've written a four-part series of articles on the **Best Project Management Practices for delighting your Government customer**.

In that series, we promised you extremely satisfying results by following these four practices:

1. High CPARs scores
2. A Government contract safe from competition
3. Business growth through new task orders
4. Referrals and opportunities for new programs within your agency

We've provided **tools** to make it easy for you to implement these practices, and shared **case studies** so you can learn and apply our hard-won experiences to increase your own contracting success.

But even after this—even while following best practices toward project success—there are still variables that can hurt your project or personal success. These are situations you should not only pay attention to, but you should know how to mitigate these risks when possible.

Discover the first Risk Factor in our article below:

Risk #1:
Big Challenges – You Can't Overcome Them Alone

In this article, we're going to look at challenges that are difficult for Program Managers to overcome on their own, without the help of a strong and supportive senior management and/or strategic planning.

Three Kinds of Big Challenges

Program Managers face many challenges in their task to deliver successful programs to Government customers. There are, however, three categories of challenges that are big enough that a PM needs a lot more to overcome them: support from "Corporate" (or senior management) and good planning. We have termed these three categories:

- Technical Challenges
- Silo Challenges
- Policy Limitation Challenges

1. Technical Challenges

Too often a project's requirements are communicated by the customer contracting team one way, but in reality, there are unforeseen requirements underneath those written in the contract. They may not be needs that run throughout the life of the project, but are part of the requirements that the customer did not remember to ask for, or did not realize existed.

For example, if your project is to migrate your customer from physical servers to FedRAMP, you might discover early on that the customer's servers are twenty years old, and no one on your project team has the qualifications to work with equipment with this sensitivity and age.

> **How to resolve:**
>
> Perhaps it's obvious, but the best way to handle such challenges is ensure senior management is aware of the issue, and to make necessary internal hires for specialist roles, or to ask your customer to issue a task order to hire a specialist who can fulfill the technical requirements. Whatever the technical challenge is, senior management needs to be involved to:
>
> - Provide you as the Program Manager with the needed resources you need
> - Ask the customer to provide requisite the needed resources.
>
> Another solution to consider is bringing in subcontractors, who can fulfill a specialist role that is lacking on your team, but needed for the project.

2. Silo Challenges

Government agencies operate in silos—the vast majority of projects have to deal with challenges inherent to this "siloed" environment. This means that your project has an impact upon, and is influenced by, people outside your customer and your area of influence. Unless you are in the rare situation where you have a relationship with every outside department (aka "interested party") that your project touches, the distance between your customer and these outside interested parties can be quite wide.

For example, if you are working to complete a step in your project, and need access to an environment managed by another contractor, how should you best handle that? What does a Program Manager do when your company does not have control of an outside environment and moreover, your competitor controls it? (This is especially sensitive in re-compete years.)

Let's consider another common issue: what if the real challenge isn't obtaining a needed security clearance or complying with an interested party's protocol, but a simple personality issue? If a Program Manager doesn't have a relationship with the outside interested party, and that party can prevent the project from moving forward, how does the Program Manager overcome it? What if your project's impact on an interested party is a problem because it affecting the "baby" of an interested party who has the power to block your project? It could be a desire to protect institutional knowledge, job security, or a whole host of reasons why your project is blocked by an outside interested party, but because of the silo environment, it is a challenge you need to prepare in advance to overcome.

> **How to resolve:**
>
> There are two ways to handle the challenges that come from managing a project that crosses into another silo:
>
> - The best way to ensure you can overcome silo challenges is from the very start. During contract creation become well-informed of the knowledge, assets, and clearances needed to deliver your project (especially if your customer does not have them), and understand the

impact your program will have both on your customer and any outside interested parties. With this knowledge and understanding you can put into the contract what your teams need to avoid and overcome silo challenges.

- Ensure you have open lines of communication to your senior management and the customer's senior management, so that when unforeseen issues inevitably arise, you have a channel to engage seniors on both teams who have the power to resolve any issues that are outside of your power as Program Manager to overcome.

3. Policy Limitation Challenges

What do you do when key elements of project management best practices conflict with security requirements? We've run into this problem ourselves. In the past, applications of ours were hosted on secured machines owned by the client. The security was set such that we did not have access to the secured machines and, as a result, could not perform best practices, such as logging performance issues or errors, directly on the machines.

Because we could not monitor and control the applications, and because our developers could not touch the production machines, we did not have transparency into the performance of our applications. Without this knowledge, we were flying blind and could not debug issues... all the while we were still held responsible for these issues.

How to resolve:

The ideal way to overcome this kind of a challenge is to ask all the right questions before winning a contract, to ensure you understand the policy limitations, and how they interact with: A) The resources required to fulfill the contract, and B) how you can follow best practices to deliver the project. Once you have a complete understanding of the policy limitations, you can write into your proposal the methods by which your company will deliver the project using your project management best practices, while still upholding the security requirements.

If it's not possible to head off policy limitation challenges at the pass, then it's important to engage with policy makers/program stakeholders, in accordance with the project communication plan. Once all stakeholders understand the issues, you should be able to reach agreement on a compliant solution. Inform or escalate to the Project COTR as required. No matter what the challenge is, if the customer is able and willing to provide a solution, it's usually the best solution and strengthens your relationship to them. Asking them for input demonstrates your willingness to listen to their needs, while providing strategic program value.

In conclusion, we have to admit these issues and solutions to them are well-covered in the project management world, and this article only scratches the surface of effective ways to overcome big challenges. Discover how big your project risks really are: Take our Program Health & Company Risk Assessment:

[TAKE THE ASSESSMENT]

Risk #2:
3 Ways a Lack of Alignment Between Teams Hurts Contracting Success

We have spent a lot of time talking about how important it is to follow Best Project Management Practices when managing your Government contracts. Having a defined, proven process in place is the best way to consistently manage quality projects and delight your customers. However, this is not enough to ensure contracting success, and therefore this series exists to help you reflect on, then avoid or fix scenarios that can kill success.

The term Lack of Alignment in the title is one way of describing a company that does not have a unified vision and guiding principles to fulfill that vision. Though there are many ways a lack of alignment amongst your teams can prevent you from successfully delivering projects, delighting your customer, and reaching personal goals, this article will explore three of them.

1. Proposal Development: Bidding

If your company's Proposal Development team is guided by principles that are different from your Program Management team, there are bound to be problems in contract fulfillment.

For example, if your Proposal Development team, guided by senior management, sought to win by bidding a contract at a very low labor rate, what would happen to the Program Management team when development was ready to start? The Program Manager would not have the budget to hire a large enough team or a team with the necessary skills, and a significant performance risk would enter the project. The Program Manager would be forced to train and depend upon junior developers (hired to do senior architect work), or every member of the team would be forced to wear multiple hats on an under-staffed project.

At a past company, one of our employees worked on a contract for NORAD. One of the customer's biggest concerns was over the number of projects that needed to be completed each year (about 12 projects were being completed each year, run by 15 program managers). Due to budget cuts, the new contract requirement was to complete the same number of projects with just 3 of those 15 program managers. The Proposal Development team did not push back or negotiate, but simply submitted their bid, agreeing that the program managers would just “do more work.”

In the end, with a lot of process streamlining and hard work, the projects were successfully delivered, but not without great personal sacrifices. This specific story aside, success in such circumstances is extremely difficult to reach: a lack of alignment between Proposal Development and Program Management leads to delivery delays, budget overruns, and even flat-out failure.

And when this happens, the culprit is not correctly identified as a lack of alignment across the company; instead, the Program Manager becomes the scapegoat.

To succeed in contracting, it's extremely important that companies are both: 1) led by senior management with a unified goal (and a plan to reach it), and 2) enabled to have regular cross-team communication. These things ensure a company stays aligned in its Proposal Development and bidding.

2. Business Development: Promises

Similar in action but (often) different in context and consequence is when the Business Development team is misaligned with the Program Management team. This situation occurs commonly in ongoing contracts, when project modifications are discussed, new task orders are created, or when contracts go up for renewal.

It's natural for a Business Development team to get excited at the prospect of new business (in any industry, not just in Government contracting!) and in their aim to win it, turn the customer's every wish into an executable item in the contract. If you've experienced this, you can probably relate to the desire to go to your director of Business Development and yell, “You promised to deliver them what?!”

Whenever Business Development makes promises to a customer, setting expectations that the product will have certain benefits, at a certain cost, and within a certain time, then those promises must be in-line with what the Program Management team can deliver.

Instead of affecting a new customer, (such as what happens when Proposal Development & Program Management are misaligned), a lack of alignment between Business Development and Program Management sets up the latter—the execution team—for failure.

Instead of having the intended effect of delighting a customer (by giving them what they wanted), it has the opposite effect: a customer's expectations are set so high that even meeting their original desires will be disappointing in comparison to the grand vision promised by Business Development.

When a customer is not happy with a completed project (or project milestones you’ve delivered), who does the blame fall on, and who receives the negative review? Unfortunately, too often it falls on the Program Management team.

3. Overall Company Vision from Opportunity to Project Close

Now that we've covered some consequences arising from of a lack of alignment between teams, we want to look at the underlying reason misalignment happens in the first place: when there is a lack of over-arching principles that guide the company in its Government contracting endeavors.

The most important question to ask in the context of this topic is: what are your company's goals for contract fulfilment, and what are your company's principles for reaching those goals?

If Proposal Development bidding at too low a labor rate (for the sake of winning at any cost), or if Business Development is promising things that Program Management cannot deliver… then the real problem is one of company leadership and guiding principles at the deepest level.

If you as Program Manager are mission-oriented and lead your team in a mission-oriented manner, but your senior management is profit-oriented, though you work for the same company, it won't feel like it. No matter how well you manage your project, the principles that you use and the principles that senior management uses to manage projects are opposed to one another. This misalignment will inevitably damage the quality of the project and the result for your customer.

We could look at many more specific scenarios that show how a lack of alignment in contract fulfilment can wreak havoc, but it's more valuable for you to consider how that misalignment comes about, and how it can be resolved.

How to Resolve a Misalignment

To help you reflect on your own situation, consider your own goals and principles in fulfilling contracts, and then consider the other teams' goals & principles, then consider those of senior management. Here are some questions to reflect on:

- Do you have a misalignment problem?
- How well-aligned are the other teams' goals & principles with yours?
- What are the areas of the most overlap or agreement?
- What are the areas that are the most sundered or have the most disagreement?
- Why do you approach contract fulfillment in this way?
- Do you know, or can you guess, why the other teams/senior management approaches contract fulfillment in this way?

After you've answered these questions, sit down first with your senior manager, and learn how well your answers match with what they tell you. Then invite the other teams into a meeting to discuss each team's approaches and principles. The most important thing in this meeting is to listen: to understand where each team (especially the senior managers) is coming from, and to make notes.

Most of the time, you will discover that there are more principles and processes that are unified, than ones that do not align. Discuss and plan with these managers how the teams can focus on these unified principles, using them as much as possible in every aspect of contract proposal, relationship development, and project fulfillment.

In a rare case, you may discover that the differences between your team and that of senior management are philosophically and intractably misaligned, and there is not enough common ground to succeed. If this is your situation, consider taking our Program Health & Risk Assessment. You'll get a personal score rating your program's and your company's health & risk, as well as next steps to take based on your personal score.

TAKE THE ASSESSMENT

Risk #3:
When Customer and Project Management Priorities Compete:

3 Ways a Lack of Support from Senior Management Can Hurt Your Government Contracting Success

No matter how good of a program manager you are, some factors will impact your success over which you have little to no control. Perhaps the biggest factor of all comes from within - your contracting culture and company leadership. We're sharing here three ways contracting culture and company leadership can hurt your project and personal success:

1. Communication & Authority: what does senior management do when customer priorities conflict with your priorities?
2. Bureaucracy: when an opportunity with a deadline appears, how fast does senior management react?
3. Responsibility: does senior management take ultimate responsibility?

Let's look at these one at a time.

1. Communication & Authority

When senior management keeps too much power or does not support the decisions their program managers make (or want to make), it creates project risks.

As an example of this, read a story from one of our program managers. Scope creep and undocumented changes have a very detrimental effect on a project, and this anecdote illustrates how a lack of decision-making power in the hands of the program manager created serious problems in the project:

A few years ago, our program manager was working at a different firm on a contract, and his technical program manager Bill was responsible for software development. The contract was a fixed-price agreement (which is a very bad idea for software development in the first place), and while testing it, the customer would regularly reach out to technical program manager Bill and ask, “Can you tweak this here, or add this other functionality there?”

Bill stood firm and told the customer no – these changes and additions were not laid out in the scope of the contract, after all. Though they could have been good additions to the software, they were outside of the contract, and if followed would result in not reaching the top of the mountain but getting lost on a rabbit trail.

Unfortunately, when the customer got “no” for an answer, they instead turned to senior management and asked again. Senior management not only said yes to the scope creep request, but because the contract was fixed-price, they were essentially agreeing to do the work for free.

The technical program manager Bill now had to mitigate a key risk factor with a real change to harm the project – he had to both deliver the contracted software on schedule and on a fixed budget, as well as the extras and last-minute additions. Senior management had ordered him to: 'Follow the white rabbit **and** summit the mountain, but don't be late!'

Inevitably the project did come in late, over-budget and didn't meet the requirements. The contractor looked bad and when yearly reviews came around, senior management tried to count this failure against Bill, holding him responsible. Thankfully, the Program Management Officer stepped in and resolved the case, getting Bill's record cleared. But it doesn't always turn out this way.

This story illustrates how important it is that senior management supports and empowers their program manager, first by communicating with the program manager before answering a client about a project, and second by giving the program manager the power to make decisions, even when the customer doesn't like the decisions made. No one knows the needs of the program and customer better than the program manager, and no one has more stake in a successful program and a delighted customer than the program manager. In general, the more authority a program manager is given, along with personal success and failure tied to the program, the better results that program manager will produce.

An empowered program manager maximizes delivery & profits at the same time!

2. Bureaucracy

Most small businesses don't have a significant problem with internal bureaucracy slowing down their effectiveness and speed. But in a big company, corporate culture, silos, bureaucracy, and complicated reporting structures can make a program manager's life extremely difficult, with the result that program success becomes an ice-climb instead of a walk around the block.

Let's illustrate this with another anecdote from our archive: in the past, one of our employees worked at a different contractor and was talking to their customer about a contract modification (a small add-on solution), just one month from that customer's fiscal year-end. The opportunity was perfect: the customer had extra budget, was interested, and gave them the green light for the contract modification. All that needed to be done was for the contractor to accept a mod request… essentially signing off on a piece of paper. Well, that request got lost in the contractor's corporate bureaucracy for 45 days. When the contractor finally tried to respond and accept the modification, it was too close to year-end and the customer had already used the remainder of their budget, replying that their shoo-in order was now a no-go.

While our first story was a showed how senior management needs to support and give a program manager appropriate authority over a project, this example is a reminder that that no matter how big a company becomes, it needs to have a process in place to quickly seize every opportunity.

Imagine the frustration and loss of morale when senior management fails a program manager (and the company) by missing an easy opportunity – why work so hard to save costs and deliver a project if you are going to ignore business that falls in your lap?

3. Responsibility

This principle is very simple, but when a lack of support exists in your company's chain of responsibility, your project's issues are going to go unresolved or spiral out of control.

The fact is, a program manager has a significant share of responsibility for a project's success or failure. Nevertheless, the best program managers give credit for success to the people they manage, while taking more than their fair share of responsibility in failure.

When there is a lack of support from senior management when it comes to responsibility, the opposite occurs: a problem arises that is outside the power of the program manager to resolve, but senior management doesn't take responsibility to resolve it.

Senior management's main task is to support their program managers. If for one reason or another a project fails or doesn't reach a company's goal, the first question a good senior manager will ask is, "How have **I** failed?" Then senior management will directly address the issue with the directly and take responsibility for it.

If senior management holds to the principle that the "buck stops here," issues are naturally and effectively resolved. Meaning, when a problem is bigger than a team member can solve, it will go to the program manager, and when a problem is bigger than the program manager, it will go to senior management, who will then resolve the problem or take responsibility for failure – never pushing problems back down the chain. Problems linger in limbo when senior management pushes issues back down the chain of command, leaving the responsibility on the shoulders of “someone else.”

Your Next Steps

A constrained (albeit experienced & well-intentioned) program manager is a big risk variable for a project… an empowered, supported program manager makes all the difference.

No matter how well you perform as a program manager, following Best Practices and staying focused on the mission, it is vital that senior management supports you in the areas of Communication & Authority, Bureaucracy, and Responsibility. A successful project can quickly go astray if senior management fails in one of these areas.

Do you find yourself or your project facing the same lack of support in one or more of these areas?

If you find that these concepts hit close to home, take our Program Health & Company Risk Assessment. After filling out the questionnaire, you'll get a personalized assessment of the health of your Program and Company, as well as steps you can take toward greater success.

TAKE THE ASSESSMENT

Risk #4:
Change Brings Challenge: Even Good Change Can Hurt Your Long-Term Success

In the first three articles of this series, we described internal problems that often lead to project failure, problems that can undo a program manager's best efforts to deliver quality projects.

Do you feel like you get punished for doing a good job? If so, this article is for you.

We're not going to look at technical, environmental, or internal problems that lead to project failure, but issues that often arise from a program manager's success. In other words, when a project succeeds, the program manager can sometimes become a victim of that success.

Successful Projects Bring Challenges

All too often, we've seen a project start very agile, with a lot of ongoing discovery and collaborative solutioning alongside the customer.

This agile, collaborative, solution-focused approach leads to success, and not only success but project expansion. In this mode of project delivery, customers say this to us, “Hey, this project has been so valuable here, why don't we apply it in a new context over here, or expand it to serve these other needs here?” Often the role of the program manager expands along with the project.

Perhaps the program manager started as a technical lead, working alongside the delivery team to fulfil the contract. Now due to success and promotion, the program manager has several programs to manage, and can no longer focus on leveraging the technical skillset that put him/her into the original position in the first place. Instead, he or she must focus on other things – the big strategy of several projects, improving operations, efficiency, and managing many team members. The program manager went from a very intimate, creative, and solution-oriented role, to a strategic, operational, management-oriented role.

All too often, the more a program manager succeeds, the less he or she can use experience and skills to solve problems, and the more he or she must act as a cog in the wheel of expansion. The program manager gets spread thin (trying to complete new tasks outside his or her areas of strength) and gets discouraged because success in the new role is less fulfilling. He/she wasn't dreaming of making operations an incredibly efficient machine, enabling the company to healthily expand; instead he or she had dreamt of solving real problems alongside their customer.

In this situation we aren't talking about project failure, but personal failure for the program manager. In either case, the reason this article exists is to help program managers recognize when their role is shifting and how to make changes to remain in the place they perform best and most enjoy.

Though we're talking about personal failure in this case, sometimes when a program manager's role changes along with the forces of necessity, it can have a negative impact on the company as well. What if your business development manager successfully leads the company in growth, but due to a lack of reflection and the necessity of getting business done, ends up in a program manager role instead?

We've got a tale from our archive to illustrate how this situation can absolutely bring about big picture failure.

One of our senior managers was hired at a previous company to lead their company expansion and take them to the "next level" from small business to large business. In less than a year after joining, that manager had helped bring in an extra $15 million to the company. And due to a lack of planning, reflection, and this success, the company asked him to help manage all the new programs. By the time the manager left the firm, he was managing 60+ projects in over 22 programs, and not helping the company bring in new projects and reach the "next level" at all. Even after all the success, the company was still a small business and the manager was not doing what he wanted nor had been hired to do.

Here's a simple thought: senior management needs to know its people well (especially its managers), ensuring that each person is working in their strengths. "Keep your growth people growing and your operations people operating."

The Easiest Method to Discover Role Incongruity

Here's the question to ask yourself as you consider whether you are facing Role Incongruity:

Are you choosing your bus seat, or is your seat being assigned? After all the change & growth in your projects, are you still in the right seat?

The opportunity for senior management to keep a finger on the pulse of this congruity/incongruity is during performance reviews. These times are not merely a chance for senior management to provide feedback to you, but more importantly to ensure you are continuing in your trajectory toward career goals (especially when you are working on programs that are experiencing a lot of change).

If a program is expanding and a technical program lead is being forced to manage more operationally, then look to move that person back to doing what he or she does best, and to bring in a person with an Ops skillset to take over the program manager role

The perspective to take on performance reviews is therefore to not merely help the associate improve and grow, but for senior management to help them take a step back and stay on track for "big picture" career progress.

If senior management discovers that a person's role has shifted and misaligned due to changes in a project or overall company changes and that program manager is no longer working in an area of strength, what should they do?

6 Ways to Avoid or Fix Role Incongruity

1. Manage your own career path: periodically assess your professional needs and aspirations and map those to the bigger corporate picture.
2. Similar to your aspirations, what are your strengths? Do your strengths play well into your company's success and potential future roles?
3. Senior managements' job is more than simply knowing their team's individual skills and leveraging them to the best of their ability, but do they know your personal goals, and do they want your input on your career trajectory?
4. Program managers who perform should receive the recognition and reward that they've earned. If they are working hard toward achievement but not reaching it, it could be that they are in the wrong role.
5. Furthermore, company culture should stress open communication between senior management and program managers, so that these issues can be quickly and handled appropriately
6. Just as senior management should maintain a culture of open communication, the company should also have a developed policy in place for you to bring issues up the organization tree, to enable you and your own team to "fight for feedback."

What about you?

Where do you find yourself currently?

Are you operating in your strengths, in a role that takes advantage of your skills and experience?

Or are you currently experiencing role incongruity?

Do you find yourself at a stage where your career trajectory has flattened out, and you're struggling to get the kind of results you could in a different role?

Are there any roles even available that you want?

We put together a Program Health & Risk Assessment Questionnaire that will help you answer this very question. When completed, you will receive a unique Program Health Score, with specific feedback to help you:

- Get perspective on how well your current role enables you to utilize your strengths
- See how closely your approach in project fulfillment matches that of your company

- See how well your company helps its employees reach their fullest potential

This review template will be the perfect tool to discuss with senior management and turn your quarterly performance reviews into an opportunity for you to gain new support in your career growth. It's an ideal way to show senior management how important it is to you to get the best results that you can from your own work, and how well your strengths match the responsibilities you have been given.

TAKE THE ASSESSMENT

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Team Member Weekly Status Email Sample

<**Subject:**> Weekly Performance Summary

Here is the weekly metrics summary for the week ending in [insert date]:

Progress:

1. [Summarize Scrum question #1: What have you accomplished?]
2. Example: 26 leads processed this week
3. Example: Made first contact to most viable leads.

Action Plans:

1. [Summarize Scrum questions #2 & #3: What are you working on? What issues are you dealing with?]
2. Example: I will continue finalizing the process documentation for lead generation.
3. Example: I will continue progress (on track) on <project B>

Questions, Impediments, or Risks:

1. [Summarize any questions of obstacles preventing you from making ideal progress]
2. [Describe any risks or issues that you notice on the project. Doing so before your manager asks or notices the same issues can quickly position you as a responsible, dependable, leader on the team.]

Please let me know what else I can assist with.

[note: train your team to always end with an offer to assist for improved ownership mentality and give-first culture]

Thank you,

[insert name]

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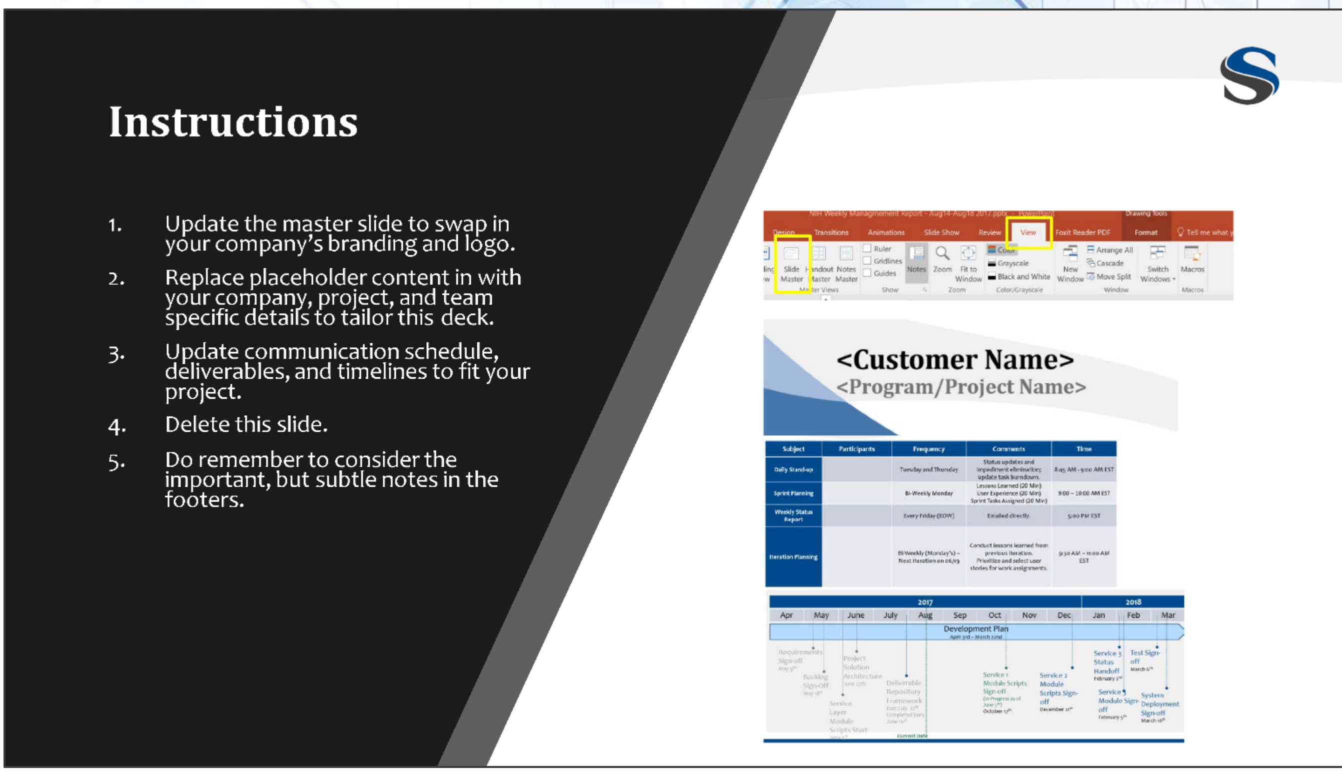
Weekly Status Report Template

A MS PowerPoint template:




NIH
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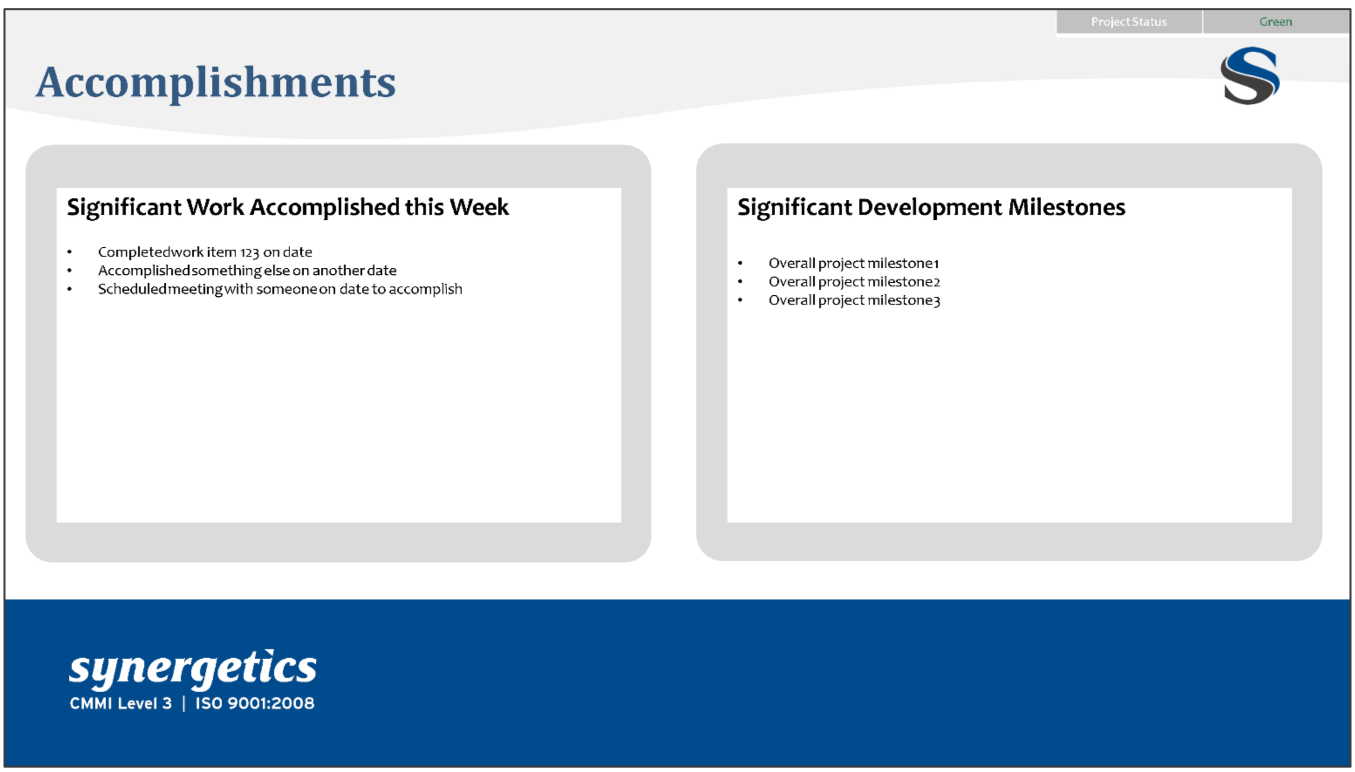
<Customer Name>
<Program/Project Name>
Weekly Status Report
<week start date – weed end date>
Business Name <Your business name>
Contact Name & Title <Account Manager Name>
<Account Manager Title>
Contact Phone <Account Manager Phone>
Contact Email Address <Account Manager Email>
Prepared By <Project Manager Name>
<Project Manager Title>


Project Status
Green
Accomplishments
Significant Work Accomplished this Week
• Completed work item 123 on date
• Accomplished something else on another date
• Scheduled meeting with someone on date to accomplish
Significant Development Milestones
• Overall project milestone 1
• Overall project milestone 2
• Overall project milestone 3
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CMMI Level 3 | ISO 9001:2008

Project Status | Green

Iterations, Risks and Issues

Date	Milestone	Status
~~May 22nd~~	~~Understand and create entity mappings~~	~~Completed~~
~~May 22~~	~~Project Solution Architecture~~	~~Completed~~
~~June 16~~	~~Repository Framework Architecture~~	~~Completed~~
~~June 23~~	~~Services Architecture~~	~~Completed~~
~~July 30~~	~~User Login and Authentication~~	~~Completed~~
~~July 30~~	~~Application Menu and Roles displayed on Application interface~~	~~Completed~~
~~July 5th~~	~~Iteration 4~~	~~Completed~~
~~July 17th~~	~~Iteration 5~~	~~Completed~~
~~July 31st~~	~~Iteration 6~~	~~Completed~~
Aug 14th	Iteration 7	Started ~~R1, R2,~~ I1, I2, I3
Aug 28th	Iteration 8	Not Started

ID	Risks	Mitigation
R-1		
R-2		

ID	Issues	Mitigation
I-1		
I-2		
I-3		

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Project Status | Green

ISSUE #2 – Configuration Management System Updates

CM Status Indicators

- **Green –** *Effort Tracked on on-track.*
  - *(Best Practice and Ideal State) (33% of Team)*
- **Red –** *Effort not updated or missing updating efforts by Team member*
  - *(Good – but not ideal) (33% of Team)*
- **Gray -** *Work is assigned but team resource did not update so progress is unclear.*
  - (Unsatisfactory – Project is at Risk) (33% of Team)

Mitigation Plan

1. Progress Needs to be updated daily in TFS
2. CM Needs to be updated before every Tuesday and Thursday's Scrum Session and the End of Week Report
   - CM Schedule and Due Dates
     - Monday - End of Day
     - Wednesday- End of Day
     - Friday - End of Day

✓ Agree to and commit to this delivery schedule
✓ Make 100% of the team compliant with the best practice, ideal state

CM Status Example

<Insert CM (i.e. TFS, Git, Bitbucket, SVN) screenshot here>

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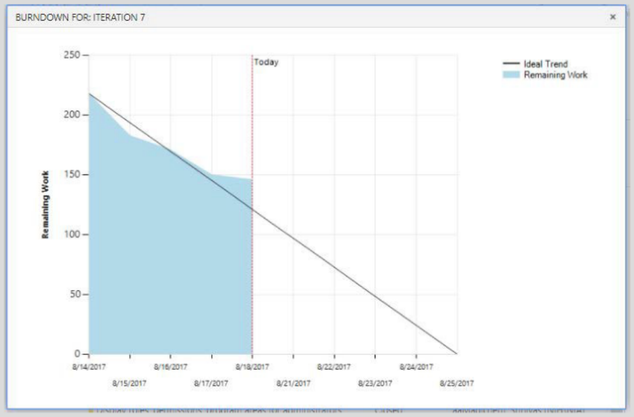
Project Status | Green

Weekly Project Time-Keeping

Iteration 7 – Started.

- Dates : 08/14– 08/18
- Hours Worked - 40
- Hours Remaining – 679



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Iteration 7 focus is on :
Main focus item 1
Main focus item 2
Main focus item 3

Project Status | Green

Iteration 7 Assignments

Iteration 7 Tasks Completed by Resource			
Sally	**Shawn**	**Jasmin**	**George**
User Interface modification for Administrators	Build back-end logic for criteria based on the PCC Data Options	Business Intelligence Reports	Data Migration Script for current system to New system.
Service Layer functionality for Application Modules	Updating Programs based on the Schema Changes	Updated Data Access Layer and Models based on the Schema Changes	
Service layer functionality for Application Menus			
Data Tables Export functionality and state persistence			

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Project Status | Green

Focus for the Week of Aug 21st 2017

- Team to focus on development of Service Layer Module Search Functionality.
  - Save search criteria on the Search form
  - Populate previous search criteria for each user in Json File along with data grids save states.
  - Execute the search criteria and display data in Grid with ability to paginate the dataset.
  - Continue with Business Intelligence Report development.
  - Database changes for Data Access Layer and pass through updates in model.
- George and Sally to continue focus on development of data migration script from current databases to new application database.

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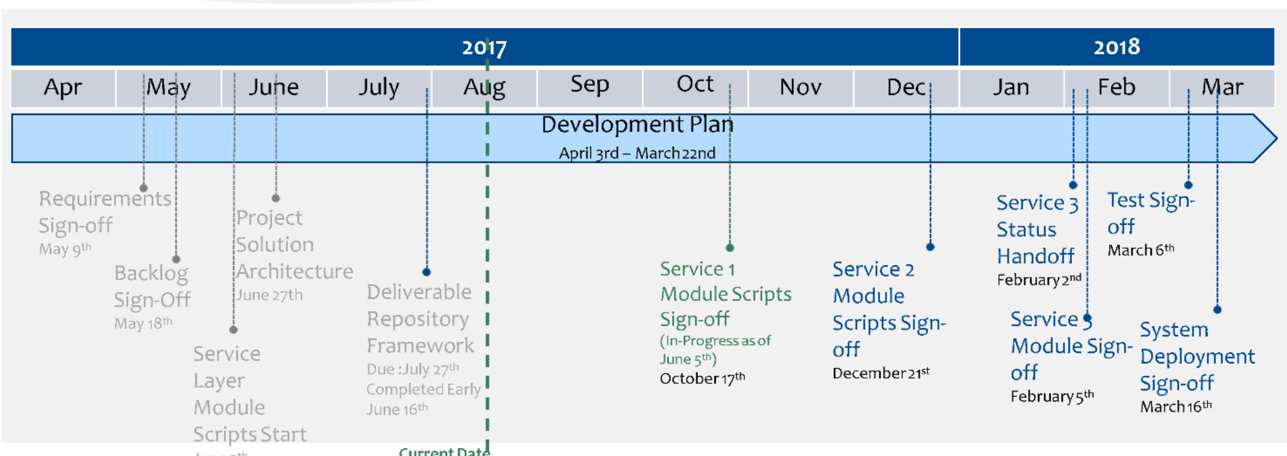
Project Status | Green

Deliverables & Approvals Timeline



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Project schedule runs from April 3rd 2017 through March 22nd 2018. Approvals and deliverable handoffs are coordinated with Customer Project Manager.

Project Communications

Subject	Participants	Frequency	Comments	Time
Daily Stand-up		Tuesday and Thursday	Status updates and impediment elimination; update task burndown.	8:45 AM - 9:00 AM EST
Sprint Planning		Bi-Weekly Monday	Lessons Learned (20 Min) User Experience (20 Min) Sprint Tasks Assigned (20 Min)	9:00 – 10:00 AM EST
Weekly Status Report		Every Friday (EOW)	Emailed directly.	5:00 PM EST
Iteration Planning		Bi-Weekly (Monday's) – Next Iteration on 06/19	Conduct lessons learned from previous iteration. Prioritize and select user stories for work assignments.	9:30 AM – 11:00 AM EST

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Business Name	<Your business name>
Contact Name & Title	<Account Manager Name> <Account Manager Title>
Contact Phone	<Account Manager Phone>
Contact Email Address	<Account Manager Email>
Prepared By	<Project Manager Name> <Project Manager Title>

8-Point
IPR Checklist

Must-Dos to Prepare an IPR Presentation that Builds Relationships & Grows Reputation

□ 1. Dress

Select what you wear for your presentation according to your customer's culture. Each Government agency has its own unwritten code about what is appropriate. Simply relying on expensive suits may backfire: as contractors, we are stewards of tax dollars, and agencies don't want to see their tax dollars spent inappropriately. If suits and ties aren't the expectation, we recommend company-branded polo shirts, which will put your audience at ease, making it easier to create an engaging environment.

□ 2. Slides

Most IPR presentations should incorporate slides... but slides are merely an aid. In fact, each slide should contain very little text (and where appropriate, images). A slide that can be glanced at in three seconds means your audience keeps their attention on you. When you are engaging them, you can turn your presentation into a dialogue that you control. You want to build a relationship with the audience, and the only way to do that is if they are focused on you – even better, if your presentation becomes a facilitated dialogue. A dialogue can help you learn what your audience wants to hear. As you talk about information that isn't in on your slides, especially enhancements and innovations, you will greatly increase the level of interest/ enthusiasm about your program.

□ 3. You run the day

As mentioned in the article, most IPRs are hosted by a Government program manager who runs the show. However, as a good contractor you should lead the presentation in order to demonstrate your stewardship of the investment the Government has made. You are the only one who can turn this required report into a golden opportunity. Plan the IPR agenda in advance with the Government program manager, so that you can deliver as much of the presentation as possible. If there are specific topics that your Government associates need to take the lead on, try to present them as a team.

□ 4. Show rather than tell

There's something you can still learn from your kindergarten days. If you can show your audience an aspect about your program or the results, it will do wonders to increase engagement. Don't dryly read slides with too much text. Demonstrate your solutions/ tools and project milestones completed, particularly where your accomplishments translate into benefits for your customers. Start by showing what is most important to your audience. If you are in the business of bridge engineering, show your work with images that demonstrate quality/ safety improvements or cost reduction features! If you build software, show how the software works by focusing on the benefits of the software, not the features! Even if your work is less tangible (perhaps you're doing research), then focus on describing the results of the program. If your program created revenue, show the benefits of that revenue, not merely a number with a dollar sign. (ie. This surplus became X benefit for the department, Tim was then promoted, and world peace was achieved, etc.)

- Technical note: make certain your demonstration will work—test it in your presentation environment (with their security enclaves, etc.). Anecdotal evidence is always preferred to a demonstration that could turn into an embarrassing technical failure.

□ 5. Bring high energy

Although a basic principle to include, high energy is a must for your presentation. For some people this is natural, but for others it is a monumental task. No matter what the case, a high energy leader will directly translate to a more engaged audience. Finally, engage the audience by asking questions, people like sharing their opinion, even an audience that's supposed to remain neutral.

□ 6. Invite stakeholders

This tip is gold. If you've put in effort to make your IPR presentation an opportunity to shine, then invite more people to attend. The more you consistently deliver exciting presentations, the more your reputation will grow, and the more willing outsiders will be to attend. Invite other departments and officers, letting them know what your agenda will be and how it is relevant to them/why they might be interested. We've done IPR presentations with 20 Government employees attending when the contract only required four. THIS is where you build reputation, foster relationships, and gain opportunities.

□ 7. Own your mistakes

How your company approaches contracting is more important than your presentation. If you are applying the Project Management Best Practices we've shared, then you may already be correcting mistakes/problems within your program, enabling you to demonstrate what you are doing to understand or resolve issues. Mistakes are inevitable – admit them and discuss your resolution plan in your presentation. Following this checklist will keep your audience engaged, encourage collaborative discussions of problems, and alleviate burdensome liabilities.

□ 8. Highlight the future

This principle has as much to do with your approach to program management as it does with your presentation. Striving to innovate better solutions and processes in how your program operates helps bring this fact to light, while also generating interest and excitement from your audience. Share the completed developments, the future developments, and your long-term goals and dreams for the project. Your presentation should keep your audience imagining the future by helping them extrapolate from the accomplishments you've already attained. Be careful not to over-promise, but cast a vison of what could be; this will help bring your presentation to a hopeful, exciting conclusion.

Case Study:
Put *Serve* in Practice

How we implemented a best practice, and how you can too

How practicing *Serve* protected our program, increased our reputation, expanded our bottom line, and helped remind us why we're still glad to be on this journey called Government contracting.

Story Background

Several years ago, we won a Government program in the realm of software and hardware for database management.

Things were going along smoothly and the program was in our “sweet spot.” We followed the Project Management Best Practices, which helped us to delight our customers by exceeding expectations and delivering the program at a budget significantly less than similar programs.

The Problem

Out of nowhere a bureaucrat in another agency (and naturally a different silo) became aware of our program, didn't understand why it existed or what its value was, and decided it was an unnecessary expense.

The problem was, they had enough bureaucratic power to influence the very future of the program. Had we appealed to our own Contracting Officer, the conversation may have gone like this,

> Synergetics: “You saw what Mr. X is considering doing, right? We need to stop them!”
>
> CO: “You're right Kabir. We value Synergetics and your program. But Mr. X is an important person, and we don't have a lot of leverage over him.”
>
> Synergetics: “But he wants to end the program – he thinks it's unnecessary. You know how valuable it is. You need to tell him how much _____ (customer) needs it!”
>
> CO: “Sure, we're doing that. But we don't really have a relationship with him – he's over in a different silo. We'll do our best.”
>
> Synergetics: “Gulp...”

While we did have a conversation with our Government customer, thankfully they weren't only ones we could turn to to protect our Program.

Applying the Best Practice

Instead, the first people we discussed the problem with were the executives and high-level stakeholders of the end-user – the organization that needed and benefitted from our program. That conversation went more like this,

> Synergetics: “Have you heard that this Agent over here is threatening to end the program?”
>
> End-User VP: “What?! Are they crazy?”
>
> Synergetics: “Yeah, that Agent just sees the program as an unnecessary line item. Thinks no one needs it.”
>
> End-User VP: “Ha! Well apparently they don't realize that 50% of our organization makes use of your product all the time. Don't worry, it's not going anywhere.”
>
> Synergetics: “So you'll speak to that Agent about it?”
>
> End-User VP: “As soon as we hang up, I'm calling the Executive of our Department, and he'll put in a call to their Executive. If needed, I'll get some of my people to write reports to testify to how much we value your product. I'll be sure your agency gets glowing reports, too.”
>
> Synergetics: “Wow, thanks!”

The Results: Program Awareness & Protection

Notice how differently those conversations went? With the continual use of this Best Practice Serve,

we prevented the loss of relationships with Government customers , while also preventing loss of revenue to our business.

> **Apply it now**
>
> The end-user always has the biggest stake in seeing your program continually deliver the solutions they need. If your program is delivering quality services to them, and through your relationship you're improving that program, your end-user will soon be your strongest advocate.

The Next Phase of Applying the Best Practice

The case study doesn't stop here. Through our relationship with the end-user, we discovered many opportunities to expand the program.

We had regular conversations over the years to discuss the product with executives of this end-user. We learned that they had several products in place that were essentially achieving the same goals as our product, but were being used in different applications. In making this discovery we asked them, “You have several products that serve similar functions as ours; why don't we bundle them up for you into a single product? Once it's running, you can cancel the others, which are far more expensive and aren't as effective as ours. Instead of dealing with

multiple products, you'll have a single solution applicable for every situation; a product that you already know and love."

The Results: Program Expansion

Over time, we developed a product that met the needs for each of the end-user's scenarios. We replaced several expensive and lower quality products, which saved the end-user money and improved the user experience. This, in turn increased the value of our program to our Government customer, and ultimately increased our company's revenue.

> **Apply it now**
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> Only the high-level stakeholders of the end-user could have given us the insight we needed to not only know about this opportunity, but to also act as advocates on our behalf to expand the program. Our direct contracting agency wasn't aware of the end-user's other programs, nor how the expansion of our product would benefit everyone involved: win for the agency because they could sell more product to the end-user; win for the end-user because of what we already shared above, and win for us because our program became significantly larger.

Only our relationship with the executives at the end-user opened this door.

One More Example of Applying the Best Practice

Let us share one more example to drive home how effective Serve really is.

The Problem

We approached the Government program manager for a different beneficiary of this same program, and through that relationship discovered they were having a problem getting our product to arrive to the end-user. We were applying the same delivery process for all customers, but for this specific beneficiary, the process was failing.

Applying the Best Practice

We connected with the end-user directly, learned a lot about their unique situation (we may have not become experts, but we dove deep into understanding their needs), and with this new knowledge we created a new way to deliver our product.

The Results: Program Awareness & Protection

The solution we developed delighted the end-user by removing both extra expense and pain while also making our Government program manager look like a hero. Now we had happy customers in both the end-user and at our Government agency, both parties who have since become long-term advocates.

So, in the end, what do these Case Studies mean for you?

When you practice Serve, the relationship you build with your end-user will become the most important success factor for you as a contractor. That relationship will protect your program, reveal opportunities to expand, and increase allies who are willing to be your advocate.

One Unmeasurable, Long-term Benefit

There is one more benefit to knowing and serving the end-user of your program: witnessing the impact your product/service has on the work and lives of the people who use it every day. If you understand why you are working so hard to deliver a quality program, or if you see tangible results and hear real stories of people who appreciate your hard work, then you will be more encouraged to continue the journey toward excellence as a contractor.

To achieve success in contracting, you need to understand the whys: *why* you are a contractor, *why* you want to bid for a program, and *why* you are running a program. Once you can grasp these concepts, the best indicator of success is the benefit that your work brings to other people's lives. How to Build these Relationships The last issue to address is – how do you build a relationship with the end-user, if you don't already have one? This case study has mostly assumed you already have that relationship, but we've provided this brief section to help you begin to build those relationships. Below are a few suggestions that we hope will inspire you to start practicing *Serve*:

- Always start with your immediate customer, the Government agency, and ask for an introduction;
- Request end-user representation at the beginning of the contract or at contract renewal, during the period of program requirement analysis – make this a dependency as part of your program development;
- Request end-user representation on the project team and during reviews;
- Establish collaborative or separate end-user product testing (with a wide range of end-user organizational roles, from intern to executive);
- Establish an end-user feedback program through questionnaires/surveys and encourage open-ended responses;
- Create post-delivery review and comment forms;
- Schedule conference calls to invite, communicate, and introduce all stakeholders;
- Include end-user executives in big project status updates, planning, issue triage, etc...;
- Invite the end-users to your IPRs whenever possible;
- Look for and meet the end-users at conferences; and
- Reach out via email, social media, etc...

The more you can work the end-user into the process of program development and management, the easier it will be to have (at a minimum) formal points in which you will get direct interaction with the end-user. Build touch points where the end-users must be involved in the design, delivery, and review phases of your program. The relationship will naturally develop over time.