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What would you do?

When a colleague is showing serious signs of imminent disaster, but refuses advice or guidance, what is your course of action?
David Shannon questions the correct procedures.

Being a competent introvert and highly organised you have risen to the top of your chosen field and are now in charge of a Project Support Office for a portfolio of strategic projects. Most of the project managers welcome your assistance and advice.

However Ms Driver, who is a forceful extrovert, has been dismissive of your contribution, running her IT Systems project on the catch phrase of "Just do it". The project is reportedly half-way through the design phase. Having been told that reported progress by the task managers has been increasingly hesitant and qualified, you decide to work closely with your progress monitor on the next monthly update.

Surprise, surprise! The expected six months remaining for the phase is still nine months on the critical path. Half the float on remaining activities has been eroded and earned value for the phase is less than 20 per cent. What is more, the project risks for this seem not to have reduced one jot. All this is at odds with your last update to the Project Manager which indicated one months' slippage and is even more seriously adrift from the last report from Ms Driver to the Project Director, which reported that the end of phase milestone would be achieved.

You immediately inform Ms Driver, who calls you to an urgent meeting. Attending with some trepidation you are surprised when she impatiently dismisses the bad news and shows no concern about the quality of your progress monitoring. Instead she announces that as far as she is concerned the project is on schedule and the end of phase milestone date stands. She states that she will make her task managers catch-up "or else!"

She will report no change to the project Director and instructs you not to undermine the chain of command on the project, nor to stir up doubts amongst the project team. Your protestations are ignored. Do you :

- Ensure that the documented audit trail of your findings and advice is complete and await the imminent annual performance review with relish.
- Raise the issue immediately with your superior who is on the same level as the Project Director.
- Check with a contact in Personnel whether the Project Director is shortly to be replaced, and if Ms Driver is a candidate?
- Contact the Project Director with your doubts.

Or is there a more professional response?

Dimitris Antoniadis

As Project Support Office Manager (PSOM) who has to deal with the various different types of Project Managers (PM) at some point you will have to cope with the autocratic type. However, you have to be very careful because, as usually in projects, the person that knows the most about the project is the PM. There are details and other information that cannot be included in a project management package however sophisticated this package can be.

In this particular case study, assuming that the necessary details from the programme management system have been double checked, and since from the details given it is obvious that the PM does not elaborate then as PSOM you should take the following steps:
1. Minutes of meeting.
    1.1. As it should be the case in all meetings there should be minutes taken
    1.2. These should be circulated to the appropriate personnel. That does not mean only the project team members, but higher management levels who are responsible for overseeing the project as well as the Support Office.
2. If the details given to the PM were not in a "progress" report format, then prepare a report with all the necessary details and forward to the PM as well as your superior authority. DO NOT send your report via the internal mail just take it yourself to both. This will serve the following purposes:
    2.1. Explain to the PM once more how strongly you feel about your findings,
    2.2. The PM will immediately notice that he/she is not the only recipient of your report, and thus will have one more chance to review the situation, and
    2.3. You will have the opportunity to discuss in detail the issue with your superior authority.
3. The latter (item 2.3 - discussion with your superior authority) will be used for the following two reasons:
    3.1. There is still the possibility that something else could be going on which you do not know and which could be known to higher managerial levels (possibility of your autocratic PM becoming the new Project Director!!!)
    3.2. Request from your manager to allow for **'additional project or overhead hours'** in order to carry out the points described below in items 4 & 5.
4. Look into the schedule and develop a more detailed "*x number of weeks*" looking forward window. For this you will need the cooperation of the project team members. Your conduct should be professional – **not undermining the PM's decisions**. Having developed a more detailed schedule, re-examine your position and what is happening to the 'phase milestone'. If the news are still bad then …
5. Request a follow up meeting, this time with the whole project team not just the PM. The purpose of the meeting must not be to "re-examine progress", but the "new range of reports that the PSO is developing and which have been piloted in this project". As the PSOM you must not lose track of your target which is to make the PM understand that his/her project is in a "mess". By facilitating appropriately the meeting you can turn the discussion from a 'presentation' to one of resolving the problems and supporting the PM and the team to take the appropriate decisions "using this *new* reporting facility".

The PSOM must never go to the PMs superior authority. The above actions have produced enough material, which has been circulated to the appropriate levels including the Project Director.

As the PSOM you are a 'liaison device' (Galbraith, 1973), which provides one of the mechanisms for integration and information flow. If your actions do not bring the required results then the 'mechanism' should be re-examined.