



White Paper 2021-08

How To Implement Project Processes in a 'Virtual Project Setup'

We work in new and more 'virtual' ways, a development speeded up by the COVID-19 pandemic - and our ways of working will continue to change years to come. Project offices are not an exception. For the new large complex projects operating in a - to a large extent - remote work setting, transferring processes, and reporting to the virtual setup in an efficient way is key to success.

How do we need to work differently in this remote setting, and implement the tools and processes that supports this work?

In this White Paper we share our experience of planning and implementing processes and reporting in large, complex projects run mostly virtually. They stem from our own experience, discussions in our network and our collaboration with clients who already start up these large, complex projects in the new highly virtual reality.

How does 'remote work change the conditions for large complex projects?

'Working from home' has many implications on our project processes and reporting in remote teams' projects are many, significantly impacting how project management processes are planned and implemented. However, the key success factors - for large, complex projects without a doubt - will stay the same: the right processes, efficient systems and skilled and motivated people. Both systems and processes need to be adjusted to suit the new remote setting.

Large complex projects were fragile before the pandemic, and the added complexity introduced by more remote work adds to that fragility. But remote work also has benefits if correctly exploited and planned for.

What are good practices when planning and implementing processes and reporting when starting up and executing virtual team projects?

Field findings – Planning for and Implementing Processes, Tools and Reporting in a Virtual Setting

We have identified the following key guidance for successful planning and implementation of virtual processes, tools and reporting of large complex projects:

- Plan early and systematically – especially communication - and adopt rituals
- Upgrade and adapt tools and processes to the virtual setting
- Collect, visualise and ensure easy information access
- Expand in extended enterprise mode

Plan early and systematically – especially communication - and adopt rituals

Large scale remote work requires more systematic and earlier planning - and a longer planning horizon - for example in when to mobilise people, how to set up communication and project reporting, implementing an efficient 'virtual' decision-making processes and communication [[White Paper 2016-13](#)]. The room to 'wiggle things in place' along the project is today reduced. We

work more as 'network nodes' – at home or other locations outside the main office, and each 'node' needs to some extent to be integrated in the project individually.

Today - as before - project organisations must change and adapt as the project progresses, and as the focus of critical activities changes from design to procurement to construction. Adequate 'transition/change' management needs to be implemented at each step to ensure that everyone in the project team is clear about the current phase organisation, responsibilities and reporting lines, and coordination patterns. In the virtual world, implicit often needs to be explicit and dedicated change management effort is required at each transition from one phase to another.

Special attention should be made to plan efficient communication and meetings. We have dedicated one of our previous White Papers to project communication assurance [[2017-01](#)], equally important in the remote setting. The lack of informal 'coffee machine meetings' and other face-to-face meetings have been identified by our clients as a major challenge to address. Plan for alternatives to these types of meetings – such as virtual coffee breaks, or 'virtual open door time slots' with managers.

It is foremost essential to have weekly rituals in place that allow and promote team engagement, anchor specific ways of working and ensure that there is proper coordination – now more important than ever.

Upgrade and adapt tools and processes to the virtual setting

The foundation for the project processes, systems, tools and reporting is set in the start-up process. To validate and plan early and systematically the tools and processes to be used have in our view become even more critical for projects that will operate in a highly virtual setting. The remote team reality also needs to be evaluated across organisational borders.

In our White Paper [[2021-06](#)] on remote work in large complex projects we describe six 'guiding stars' for tools and processes. Four of them – *seek new synergies, visualise,*

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clarify and simplify – should guide us when deciding on and implementing the right tools and processes for remote work.

We recommend implementing a digital collaborative platform (tool) for meetings, to enhance interaction and capture the discussions. It should as a minimum include a virtual whiteboard function, preferably with the possibility for participants to write their own notes.

New tools and ways of working require implementation, training and ‘remote’ ways to ensure compliance with new tools and processes – this needs to be planned and executed early in the project, but with the longer-term horizon in mind.

We observe that the Covid crisis has accelerated thoughts about collaboration and extended enterprise, and this is to remain.

Collect, visualise and ensure easy information access

We have for a long time promoted the use of action tracking as a central database [[White Paper 2012-21](#)] visual dashboards, ‘war rooms’ and easy access to key project information for visual management [[White Paper 2017-09](#)]. These tools will have increased importance in the future of large complex projects. They distribute information to project team members in an equal, intuitive, and efficient way. This ‘single source of truth’-information about all aspects of the project make sure everyone in the project team is working from the same data and reference. For example, centralised and accessible action tracking and prioritisation provides guidance, clarification and helps prioritise work in the remote team.

A conscious effort needs to be made to collect the data, manage its quality and produce relevant dashboards and indicators that cater for the need of various participants to the project. Obsolete information is becoming an increasingly large challenge in projects as team members need to find correct information on their own. Consider who will be responsible for the updates and removal of obsolete information along the project life cycle.

Another benefit is to capture key project and interaction data over time and in a consistent way for project follow-up and analysis.

Expand in extended enterprise mode

As part of the digital evolution of projects, and accelerated by the Covid-crisis, is the need to increasingly execute projects in extended teams that cross organisational and contractual borders.

It is well known [[White Papers 2018-15](#), [2013-14](#)] that integrated teams are the best response to complexity.

There is an opportunity to extend integration beyond the natural organisational boundaries by extending access to project data, and sharing project progress data, in a consolidated manner. While contractual aspects still need to be considered in the background, the emergence of virtual organisations and digital dashboards provides a unique opportunity for extended enterprise integrated teams. By having a wider set of people operating on the basis of a single shared source of data, efficiencies can be found as well as a better coordination capability which is essential in a virtual world.

We observe that the Covid crisis has accelerated thoughts about collaboration and extended enterprise, and this is to remain. How that should work with contractual arrangements still remains to be fully defined. We have seen that it is an opportunity that leading organisations exploit today - and that definitely needs to be considered for the future.

Summary

Virtual project execution produces new constraints that require a more structured approach to coordination and collaboration, as well as to project rituals. Change management needs to be more explicit and properly applied when needed. New processes and tools are required that allow better sharing of information throughout the team, re-enforcing the benefits of project visual management and the maintenance of shared, single source of truth on activities and progress data. The opportunity offered by the extended team and a further integration of projects beyond organisational boundaries can now be grasped and can offer substantial benefits in particular for very complex projects.

References:

- 1) [White Paper 2016-13](#) Project Start-Up Essentials
- 2) [White Paper 2017-01](#) How to Ensure that Proper Communication Happens Between Functions to Keep Control of a Project
- 3) [White Paper 2021-06](#) Guiding Stars on How to Deliver Large Complex Projects Successfully in a world changed by the pandemic
- 4) [White Paper 2012-21](#) Action Tracking: a Strategic Process for All Large Complex Projects that Can Easily be Centralized and Rationalized
- 5) [White Paper 2017-09](#) Why Custom Indicators and Visual Dashboards Are So Important for the Success of Large Complex Projects
- 6) [White Paper 2018-15](#) Owner contractor-cooperation
- 7) [White Paper 2013-14](#) How a Diverse, Effective Team is the Only Way to Overcome Complexity



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