



REUTERS/Pawel Kopczynski

How to Train Your Sponsor Dragon

A Project Sponsor Primer

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Speaker | Presenter | Workshop Leader

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How to Train your Dragon

Agenda

- Background/Introduction
- Preparing for a Successful Project
- What if your Sponsor is ...
- Hints and Tips
- Final Thoughts

I will need 2 Scribes

Administrivia

- ~~Cell phones on stun~~
- If you need to stand-up, step out or walk around – please do so
- More information in Addendum when you see @
- Questions and sharing are encouraged, ~~and rewarded~~
- We may “park” a topic to help us stay on task
- Evaluation at end – please fill-out and comment
 - Content
 - Delivery
 - Examples
 - Anything else

My Background

- Project Management since 1982
- In Management Leadership position since 1983
- Worked on Business, IT/Technology, Operations projects
- Worked in Government, HealthCare, K-12, Higher-Education, Agri-business, Financial, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance
- I typically run large, complex, messy projects
- As a Project & Program Manager I strongly believe in the soft-side of our world, including marketing, and I can be a bit opinionated & sarcastic



My Background

Some Larger, More Complex Projects

- The 3-year custom development project to design and create a multi-state workers compensation system that would be available for future “sale” – **with 3 sponsors, stakeholders in 3 geographic areas and a consultant company**
- Managing the rewrite of a custom Sales and Marketing automation system for a global reinsurance company – **with a new process workflow for the entire whole sales organization, during a change in organizational ownership**
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business – **requiring the overhaul of 50+ years worth of biz processes across 10 states**
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime – **resulting in a 100% turn-over of the IT and management staff**
- Assisting a state university to design and implement new PMO processes to improve department output and transparency – **with a culture of independence across the organization and a change in project sponsorship in mid-project**

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My Background

Some of my presentations include:

- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- How to Train your Dragon: a Project Sponsor Primer
- Managing Change and Surviving to Talk about it
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- The Art of Selling and Salesmanship: Tools Everyone Needs to Utilize
- A “Surefire” way to Ensure Schedule Performance!
- Managing Innovation in a Project Management World

This should tell you a couple of things...

- I find titles market & attract attention which leads to project success
- I can be irreverent, sarcastic and love debates; so comments and other opinions are appreciated
- I focus on the soft skills in project management

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Goals for today



- ❑ Make a case for why successful projects (and successful project managers) need a qualified, actively engaged, influential Sponsor
- ❑ Present ideas for engaging and managing your sponsors to maximize your project's outcome

- ✓ I will do that by presenting content, engaging in a dialogue, supporting my points with present-day, real-world examples and asking for contributions from the group

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Definitions



- **Project:** a temporary endeavor undertaken to create a unique product, service or result.
- **Project Manager:** the person responsible for accomplishing the stated project objectives (on time, on budget all the features, and with everyone smiling – jgp)
- **Project Sponsor:** A person or group who provides resources and support for the project, program, or portfolio is accountable for enabling success.
- **Project Sponsor (sometimes called Executive Sponsor):** is a role of the senior member of the project and often the chair. The project sponsor will be a senior executive who is responsible to the business for the success of the project
- Due to the problem solving needs of the role the sponsor often needs to be able to exert pressure within the organization to overcome resistance to the project. For this reason a successful sponsor will ideally be a person with these five personal attributes - understanding, competence, credibility, commitment and engagement

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Assumptions

- You have a Project Sponsor assigned to your project(s)
- Your Sponsor is “good enough” to meet project needs
- Not all Sponsors are qualified for the role when you start the project
- Everyone has an agenda – not always the same agenda as yours, or the project Sponsor’s
- Your interest is to deliver the project on time, on budget, with all the proposed features - with a smile on the Sponsor's face

Note:

- What do assumptions become when they are communicated, transparent to all and agreed upon?

Introductions



- Works in Construction, Engineering, Business Operations, Process Improvement
- Is a ~~Project Manager~~? Portfolio? Program? Scrum Master? Product Owner? Staff Manager? Other roles?
- Has been a Sponsor on a project?
- How would you describe the sponsors you have had for your projects
 - ✓ Think presently or in the past
 - ✓ Use 2-5 word label

How to Train your Dragon

Any QUESTIONS Before we dive-in?



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A Comparison to Training a Dragon

- Sponsors are often misunderstood
- Patience and trust are required to train them right
- Some people will want to kill your Sponsor, or gang up against them
- With a little help and guidance your Sponsor can fly
- A project Manager needs to “Rub” the Sponsor the right way to get them to do what is needed
- Do a good job building a relationship with your Sponsor and they will be your loyal partner for life



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Preparing for a Successful Project

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Preparing for a Successful Project

- You are assigned a new project, what are the things you need to organize or create to be successful?
 - ✓ Goals and objectives
 - ✓ Resources
 - ✓ Milestones/project plan
 - ✓ Budget
 - ✓ Communications plan
 - ✓ Risk management plan

and.....

- ✓ The Right Sponsor

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What isn't The Sponsor's Role

- Accept no risks to the project
- Accept all risks without question
- Own the details
- Let the team endlessly debate a point of contention
- Assume all is well – all the time – and insists it stay that way

What isn't The Sponsor's Role

- Attend every meetings
- Attend only the first/last or only executive level meetings
- Make a decision or takes an action and doesn't inform the PM
- Beat-up the team regularly

Sponsor's Role

- Handle politics for project success
 - ✓ External and internal relationships
- Provide vision for the project
 - ✓ Provides timely decisions
 - ✓ Clarifies priorities
 - ✓ Governs project risk
- Facilitate cross-company communications
 - ✓ Business issues
 - ✓ Business benefits
- Exert clout on behalf of the project
 - ✓ Clarifies decision making framework



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Sponsor's Role

- The size and complexity of your project determines the appropriate Sponsor
- The bigger and more complex the project the....
 - ✓ higher-up the sponsor needs to be in the organization
 - ✓ the more prepared and qualified they need to be



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On-Boarding your Sponsor

- It is the most critical time in the relationship
 - ✓ It is the beginning of forming the partnership required to be successful
 - ✓ Sets the tone for the rest of the project
 - ✓ Gives you a chance to define expectations for later referral
 - ✓ It is often your first chance to get a feel for their personality
 - ✓ Many times it is your chance at giving them a first impression of you

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On-Boarding your Sponsor

- What to cover during the process
 - ✓ Confirm their experience and understanding of the role
 - ✓ Determine Project Charter
 - ✓ Define milestone deadlines
 - ✓ Identify Resource needs: general and specific
 - ✓ Define expectations of the people on the project team
 - ✓ Determine standard project communications: format(s) and timing
 - ✓ Best way to work with and contact them in the event of an urgent need
 - ✓ Confirm what is their role, and what is not their role



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On-Boarding your Sponsor

- Make sure to speak the sponsor's language:
 - ✓ Business
 - ✓ Finance/Revenue/Benefits/ROI
- Remember the sponsor cares about:
 - ✓ Outcomes
 - ✓ Life after the project is complete
 - ✓ Looking good to their peers and their boss
- Remember you are the project expert
 - ✓ They are the business/application/process/technology expert
 - ✓ They are most likely more experienced with managing staff and/or processes than with sponsoring projects

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Sponsor Attributes

- Be a good listener
- Be a good communicator
- Adapt to different personality styles
- Understand the business/application
- Be well networked – internally and externally
- Have the vision of how the project will meet enterprise goals and objectives
- Have the authority and influence across the project landscape
- Be engaged – and invested in the outcome
- Provide Yeah, Rah, Rah!
- Follow the PM's direction



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Sponsor Attributes

- Honestly evaluate their skills against the Is/Isn't lists
 - ✓ What are their strengths
 - ✓ What are their weaknesses
 - ✓ As best you can.....



On-Boarding your Sponsor

Exercise

- Make a checklist of the typical on-boarding questions you would ask a sponsor you are working with for the first time?
 - Identify which are required, optional and only apply to special situations

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What if your Sponsor is....

✓ **Wrong level of the organization**



✓ **Energetic but inexperienced**

✓ **Unengaged, Unhappy, Uncomfortable**

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Sponsor is at the Wrong Level

- If too low - determine if they have extraordinary clout
 - ✓ Determine if they have a relationship “high enough”
 - ✓ Determine if you or someone on the team can help
- If too high - determine if it will be a problem
 - ✓ Understand why they are the sponsor
 - ✓ Determine if they will stay engaged
 - ✓ Determine if their direct reports will have a problem with them being the sponsor
- Evaluate the risk to the project
- Deal with it ASAP



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Sponsor is Unengaged?

- Recognize if it is early or late in the project life
- Typical actions to take
 - ✓ Find the root cause
 - ✓ Determine if it is a temporary situation
 - ✓ Determine if you can negotiate a better situation
 - ✓ Determine if you have help in solving the situation
 - ✓ Determine if you have “other” options for a sponsor
 - ✓ Politely “document” the risk
- Evaluate the risk to the project
- Deal with it ASAP



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Sponsor is Over Eager

- Why does it matter?
- How can you tell?
 - ✓ What was discussed during on-boarding?
 - ✓ Did you build a trusting relationship with sponsor?
 - ✓ Are they approachable and/or understanding?
- Evaluate the risk to the project
- Deal with it ASAP



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Sponsor is Good Fit

- Still on-board them as you would any other sponsor
 - ✓ Don't assume they will behave
 - ✓ Even if they have worked with you in the past they may not remember the rules of the game
 - ✓ Deal with it early as you normally would



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How to Train Your Sponsor

Hints and Tips

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Building Trust

- Building trust requires building a relationship
 - ✓ Find out their interests and motivations
 - ✓ Find out their dislikes
 - ✓ Find out about their habits and tendencies
 - ✓ Understand their personality traits
 - ✓ Communicate effectively
 - ✓ Deliver on what you promise
 - ✓ Make them look good

- Don't forget the Sponsor's admin



“You cannot build a reputation on what you are going to do ...”

No Surprises

- Executives **NEVER** like being surprised – especially if they find out from their boss or peer @

- Better to warn them about “possibilities” of an impact on the project rather than hold anything back
- Be clear about what you expect them to do, if anything
- It is always good to have a proposed resolution or two

Asking a Question

- Know when to ask a question, and how to do it effectively, by asking yourself:
 - ✓ Am I trying to build rapport
 - ✓ Am I looking to gather information
 - ✓ Am I looking to lead the discussion to a particular end-point or decision @



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If you get to draft your Sponsor

- Identify the level in the organization required
- Check to see if any of the candidates have filled a project sponsor's role before
- Talk to the potential sponsors about the project, their vision and how they see their role
- Validate their availability to perform their duties
- Buy a Lottery Ticket – its your lucky day



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Typical Problems Encountered

- How to handle the following problems with your Sponsor:
 1. Does not reply back to meeting invites
 2. Not showing up for meeting – or always late
 3. Multi-tasking during meetings
 4. Goes around you or blind-sides you by committing to something you had not planned for in the allotted time

Summary

- ✓ Communicate, Communicate, Communicate
- ✓ No executive likes surprises – so work to avoid them
- ✓ Understand the attributes you need in a Sponsor
- ✓ Understand the strengths/weaknesses a particular sponsor brings to your project
- ✓ Prepare the sponsor early on in the project
- ✓ Ask a question

If you only remember 3 things...

- ✓ Build a strong, trusting relationship with the sponsor
- ✓ Project success means managing outcomes through influence: both your influence and the sponsor's
- ✓ Successfully managing your sponsor requires that they don't know they are being "managed"





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Questions, Evaluations & 1 Lesson Learned



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Email Joe to offer **feedback** or request a full **copy of any presentation**

Project Management Essentials

- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ The PM/BA Conundrum
- ✓ Building your Essential PM Soft skills
- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Using MS Project – the minimum you need to know to thrive

The Dark Arts of Project Management Series

- ✓ Yes, And... Advanced Negotiations in a Project World
- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ The Art of Sales and Selling: Tools & Techniques Everyone Needs to Know
- ✓ Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- ✓ Selling the Value of the PMO and Project Management
- ✓ A “Surefire” way to Ensure Schedule Performance!
- ✓ Leadership: The Making of a Professional, Enterprise PM
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World

Case Studies

- ✓ Building out SCSU’s PMO
- ✓ itSMF ITIL Deployment

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Addendum

Definitions



- **Project Management:** the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals
- **Program Management:** the application of knowledge, skills, tools, & techniques to a group of related projects
- **Portfolio Management:** the centralized management of one or more portfolios to achieve strategic objectives
- **Project Management Office (PMO):** is a group within a business, agency or enterprise that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects
 - ✓ enterprise PMO
 - ✓ organizational (departmental) PMO
 - ✓ special purpose PMO

Definitions

- **RAID:** Risk, Assumptions, Issues and Decisions
- **Triple Constraint:** Price/Pace/Perfection – cost/time/requirements or features
- **Table Stakes:** The minimum rigor required to handle the **mechanics** for a project
- **Resource:** everyone (or thing) that assists you with your project
- **Project Charter:** a statement of the scope, objectives, and participants in a project
- **Slack time:** The built-in time in your project where you have excess capacity or duration
- **Crashing a Project Plan:** optimizing the project tasks for quickest delivery
- **Dependency:** Required predecessor/successor



Definitions

- **POC:** Proof of Concept
- **SME:** Subject Matter Expert
- **ROI:** Return on Investment
- **CBA:** Cost Benefit Analysis
- **OBE:** Overtaken by Events: forced to be changed because of something that has suddenly and unexpectedly happened
- **ABC:** Always Be Closing (a “sales” term)
- **QNC:** Qualify-Negotiate-Close (a “sales” term)
- **OMG:** Oh My God
- **TLA:** Three Letter Acronym, something the world has too many of these days



Definitions

- **Waterfall:** is a sequential (non-iterative) design process, used in software development processes, in which progress is seen as flowing steadily downwards through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance
- **Phase/Activity/Task:** Various levels of a schedule/plan
- **T-shirt sizing:** Ballpark estimating of the size of effort to accomplish something
- **Agile Scrum:** iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a development team works as a unit to reach a common goal", and enables teams to self-organize by encouraging close online collaboration of all team members
- **Agile Kanban:** method for managing knowledge work which balances demands for work with the available capacity for new work. Work items are visualized to give participants a view of progress and process, from task definition to customer delivery. Team members "pull" work as capacity permits, rather than work being "pushed" into the process when requested

Definitions

- **Scrum Master:** resource who is accountable for removing impediments to the ability of the team to deliver the product goals and deliverables. The Scrum Master acts as a buffer between the team and any distracting influences. The Scrum Master helps to facilitate key sessions, and encourages the team to improve
- **Stand-up:** a short, focused, timely meeting where all team members disseminate information – often held daily
- **Epic:** a large user story in software development and product management
- **User Story:** informal, natural language description of one or more features of a software system. User stories are often written from the perspective of an end user or user of a system
- **Story points:** Effort level assigned to the work to complete a Story

Definitions

Joe's definitions of the multiple types of project managers:

- **Project Coordinator:** great at mechanics of the project
- **Technical Project Lead:** focuses on managing the technical team
- **Application Project Manager:** handles projects under \$500k and 10 people
- **Enterprise Project Manager:** handles projects over \$1M and > 20 people

Asking a Question

- Building rapport questions
 - ✓ How was your weekend/doing anything fun this weekend?
 - ✓ How is the family?
 - ✓ I see you like ... biking, sailing, baseball, Crown Royal, Dilbert, plants.....
 - ✓ Boy I am glad you are signed-on to be the Sponsor for this project
 - ✓ Aren't you glad that Mary is excited to be our lead SME?

Asking a Question



- Gathering information questions
 - ✓ How long have you been in your current role?
 - ✓ Have you had an opportunity to sponsor a project before? If so tell me about your experience with that project?
 - ✓ What is your day job?
 - ✓ What company/department were you at before your present job?

 - ✓ How do you see the project going so far?
 - ✓ Do you have any feedback about the project assumptions the team identified?
 - ✓ Do you have any thoughts or concerns on the project features the team has identified?

Asking a Question

- Leading the discussion questions
 - ✓ How do you see the project going so far?
 - ✓ Do you have any thoughts on the project risks we just reviewed?
 - ✓ Do you have any preference on how to mitigate any of the risks?
 - ✓ If we did ... to mitigate one of the risks would you help me talk the team into buying-in?

 - ✓ Do you think the milestones are achievable?
 - ✓ Where do you see the biggest challenge to meeting the milestones?
 - ✓ How would you handle the challenges?
 - ✓ If I did would you support it?