

**55<sup>th</sup> EOQ Congress**  
World Quality Congress  
Budapest, Hungary - June 20-23, 2011

"Navigating Global Quality in a New Era"



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## June 20, 2011 (Monday) Pre-Congress Seminars

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**KEMPINSKI HOTEL CORVINUS**

**Erzsébet tér 7-8, Budapest V.**

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**SALON MARZIO**

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### **7.3. Pre-Congress Workshop 3b**

**Monday 14:00 – 17:00**

#### **14.00 How to Run a Kick-Off Meeting for a Global Team?**

*Margery Mayer, Global Operations Experts, USA*

#### **Mayer, Margery (USA)**

Margery Mayer has a PhD in Leadership and Organization and focuses on global operations. She makes sure that communications are clear so that the organization can operate successfully. She developed communications plans that reflect who, what, when, where, and why information is delivered in the right level of detail to the right people, at the right time. Her slogan has been, "Do it right or do it forever".

Margery provides goal-oriented, pragmatic, and reliable oversight and execution. Her experience comes from many years of working with global leaders to solve leadership, organizational and communications issues.

She currently teaches Business and Strategy, and Group Dynamics and Communication for USF (University of South Florida) and Kaplan Universities. She facilitates workshops in Strategic Planning for the American Management Association (AMA) across the US.

Her last book was published in 2010: „The Virtual Edge: Embracing Technology for Distributed Project Team Success”.



# GLOBAL OPERATIONS EXPERTS

Do it right or do it forever

## How to Facilitate a Global Kick-off Meeting

Dr. Margery Mayer  
June 9, 2011

### Introduction

- ▶ What is a kick-off meeting?
- ▶ Why is it different when it is across cultures?

Issues	Actions	Outcomes
Logistics	Develop a meeting schedule and delivery vehicle	Everyone can share screens, calls, documents
Agenda	Develop format, stay consistent	Everyone is prepared for meetings
Culture	Ask questions about other's situations	Learn about challenges and adjust
Action Items	Develop a document	Use as base for meetings

# Facilitating Across Cultures

- ▶ Manage the meeting vehicle
- ▶ Manage time
- ▶ Uncover opinions or frustrations
- ▶ Keep meeting focused
- ▶ Identify agreements and actions
- ▶ Wrap up with accomplishments and next steps

## Exercise 1: Identify a project

- ▶ Describe the project's objective
- ▶ Identify its benefits
- ▶ What challenges was this project addressing?
- ▶ What is the project's scope?

This will be a project you work on for this session today.

## Exercise 2: Reviewing the Information

- ▶ Analyze the following project and state whether you can begin or not.

### Project Statement:

Deploy 1,000 desktops over four time zones within the next 90 days. You have 13 people on your team and your budget is \$3,750,000.

- ▶ What are the objectives, benefits, challenges, or scope?

## Identify what you know

- ▶ Will the desktop devices need to be ordered?
- ▶ Do you coordinate logistics?
- ▶ Is the network already installed and working?
- ▶ Look to the Scope of Work document to identify the full extent of what has been agreed to and by whom.
- ▶ Document everything you know

# Identify the Benefits

- ▶ What will the new desktops provide?
- ▶ How will the company benefit from having everyone using the same equipment and applications?

# Identify the Challenges

- ▶ Do you have a local person to coordinate onsite vendors?
- ▶ Who will sign for deliveries?
- ▶ Will your team be doing the testing and will this be onsite?
- ▶ How will you coordinate the rollout in all regions?
- ▶ How will you communicate to all regions?

# Setting up the Scope

- ▶ Scope: setting up 1,500 desktops in four times zones (6 sites) within in 90 days
  - 1 site in the London, 1 sites in the Vienna, 1 site in Beijing, 1 sites in Bangalore, 1 site in NY, and 1 site in Los Angeles.
    - UK, Ukraine – same time zone
    - China, India, same time zone
    - NY – 1 time zone
    - LA – 1 time zone

## From the SOW

Ask what is this project accomplishing? Begin to think about the deliverables.

- ▶ Each site has 250 desktops to deploy
- ▶ No network exists on any site
- ▶ The list of site vendors is provided
- ▶ All equipment has been ordered
- ▶ Coordination, installation, and testing are what has been promised.

# Project Charter

## Deliverables & Major Milestones

### Project Objective

What will this project accomplish? Specific, measurable, realistic, etc.

### Benefits

What benefit will the project deliver?

### Challenges

What challenges does this project face; communication, logistics, cultural, etc.?

### Scope

Describe the SOW from the sponsor or sales document. What does it deliver; what does it not do?

<i>What is due?</i>	<i>Who</i>	<i>Complete</i>

### Assumptions

State all the assumptions you think may be associated with this including the timely availability of resources, deliver schedules, change orders, reimbursements, etc.

### Completion Criteria:

What will be delivered and when will you know it is finished?



## Exercise 3: Your project in a charter

- ▶ Go back to the project you identified and let's fill out the charter.
- ▶ Begin with the: **Project Objective**  
What will this project accomplish? Specific, measurable, realistic, etc.
- ▶ When you are ready, let me know and each of you will share your results.



# Sharing Objectives Results

The purpose of this is to get each of you started in explaining the details of a project charter.

- ▶ Please give some background on your project.
- ▶ Walk us through the objective and tell us where you found the information.
- ▶ Anyone who has a question or comment, raise your hand and you will be able to participate.
- ▶ Let's go!

# Benefits, Challenges, Scope

Now that you have mastered the objective of the project, see if you can fill in the

- ▶ **Benefits**
  - What benefit will the project deliver?
- ▶ **Challenges**
  - What challenges does this project face; communication, logistics, cultural, etc.?
- ▶ **Scope**
  - Describe the SOW from the sponsor or sales document.
  - What does it deliver; what does it not do?



# Sharing Benefits, Challenges, Scope Results

The purpose of this is to get each of you to complete as much as you can today.

- ▶ Please walk us through the benefits, challenges, and scope of your project.
- ▶ Our job is to question or comment, as if we were team members on your project.
- ▶ Let's go!

# Quality Specifications

- ▶ Address how will you know if you met the project's objectives?
- ▶ How will you know if you added value to the company or customer?
- ▶ Example: Will this project allow something to occur? Will it directly affect the company's image or bottom line?

# External Dependencies

- ▶ As you build milestones and deliverables identify if there are any dependencies.
  - Software developed by an outside vendor
  - Hardware ordered from outside the company
  - Training provided by another department
- ▶ Is the project owner global as well?
- ▶ How will you manage the internal and external dependencies that are out of your sight and control?

# Completing the Charter

Let's continue to build a complete project charter.

## Deliverables & Major Milestones

<i>What is due?</i>	<i>Who?</i>	<i>Complete</i>

## Assumptions

State all the assumptions you think may be associated with this including the timely availability of resources, deliver schedules, change orders, reimbursements, etc.

## Completion Criteria:

What will be delivered and when will you know it is finished?

## EW IPTV Project Charter

<p>Date 11 March 2011      Rev. #: 11</p> <p><b>Project Objective</b> To develop a global hub for business focused events, multi-themed conferences, and meetings that is easily accessible and fully functional with the intention to attract world-wide based organizations and visitors to site for the provision of world class events delivery and management in their new convention center.</p> <p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>▪ The best solution for managing and providing event content</li> <li>▪ Flexibility for any event requirement</li> <li>▪ Build brand recognition</li> <li>▪ Increase revenue generation</li> <li>▪ Increase services to event organisations</li> </ul> <p><b>The Challenge</b> The brand new site Phase 1 building needs to have in place upon opening the most flexible, manageable and user controllable IP-TV and Digital Signage solution that is currently available.</p> <p><b>Scope</b> EW will provide to site's appointed supplier additional middleware technology that will be integrated with and delivered on a network backbone. The environment will allow the customer to deliver the most sophisticated user controllable, highly granular Digital Media Content - Display Solution available currently. EW will provide a total campus management software environment. We will install, test and manage a technology backbone to integrate with the environment and provide additional functionality and capability to deliver the needs of Phase 1 and, if required provide a seamless integration to the Phase 2 IP-TV project. The scope includes:</p> <ul style="list-style-type: none"> <li>• Providing digital media content to network devices</li> <li>• 1- EW CampusMedia license</li> <li>• 1- EW KioskMedia license</li> <li>• Database infrastructure and architecture build</li> <li>• Content and engineering design and development</li> <li>• 2- dedicated onsite servers</li> <li>• Delivery, set-up and testing</li> <li>• 10 graphical templates designed and deployed</li> <li>• Online training</li> <li>• 3 days of Onsite training</li> <li>• 10 days of on-site deployment and additional "on the job" training</li> </ul> <p><b>Assumptions</b></p> <ul style="list-style-type: none"> <li>▪ Pre Delivery Requirements from customer             <ul style="list-style-type: none"> <li>○ IP/Mac address schematic/diagram for proposed LAN</li> <li>○ VLAN &amp; switch schematic diagram</li> <li>○ Protocols &amp; traffic flow details</li> <li>○ EW will have access to entire site</li> <li>○ A VPN tunnel into on-site networks</li> </ul> </li> <li>▪ Live HD transmitted over IP network</li> <li>▪ Every live SD channel will require an encoder, HD an encoder and decoder as well</li> </ul>	<ul style="list-style-type: none"> <li>• EW environment will run on CPE devices</li> <li>• EW will supply kiosk hardware infrastructure</li> <li>• Equipment will be provided by customer</li> <li>• 10 GB backbone provided</li> <li>• Five live IP addresses available</li> <li>• Provision of content requirements, including:             <ul style="list-style-type: none"> <li>○ Signage requirements</li> <li>○ Commercial fair display needs</li> <li>○ Signposting standards</li> <li>○ Interactive survey guidelines</li> <li>○ Visitor welcome standards</li> <li>○ Conference info management needs</li> <li>○ Room information data</li> <li>○ Visitor guidance standards</li> <li>○ Information display/retrieval look and feel</li> <li>○ Educational information needs</li> </ul> </li> <li>▪ Full hardware specification of Kiosks devices</li> <li>▪ Detailed schematic/blueprints of the environment for wayfinding design</li> <li>▪ Detailed schematic/blueprints for room allocation system</li> <li>▪ On-site and in theatre meeting times</li> <li>▪ Travel to site will be expensed at economy airfares, hotel accommodation, and \$50 per day diem per person.</li> </ul> <p><b>NOTE: Everything related to the network, content, training, and installation will be pushed back as items are delayed. The current milestone plan is based on us being 2 months ahead of the site completion schedule. Our system should be delivered 8-12 WEEKS after the site has been accepted. This is for Mannai to discuss with the client. Any expedites will incur additional charges.</b></p> <p><b>Change: Kiosk implementations will be incorporated into this phase with approval from customer</b></p> <p style="text-align: center;"><b>Deliverables and Major Milestones</b></p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>#</th> <th>Who</th> <th>What</th> <th>Date complete</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>All</td> <td>Project kick off meeting</td> <td>4 May</td> <td>comp</td> </tr> <tr> <td>1a</td> <td>All</td> <td>Revised Project kick off meeting</td> <td>Pending Confirmation: 10 Aug</td> <td>comp</td> </tr> <tr> <td>1b</td> <td>All</td> <td>Project Restart; address outstanding deliverables</td> <td>30 Nov</td> <td>comp</td> </tr> <tr> <td>2</td> <td>Kirt</td> <td>Site Survey form with site drawings</td> <td>14 Dec</td> <td>comp</td> </tr> <tr> <td>3</td> <td>Man</td> <td>Servers moved, network ready for demo</td> <td>Date available</td> <td>comp</td> </tr> <tr> <td>4</td> <td>EM</td> <td>Kiosks ordered, 1 sent for</td> <td>Date available</td> <td>comp</td> </tr> </tbody> </table>	#	Who	What	Date complete	Status	1	All	Project kick off meeting	4 May	comp	1a	All	Revised Project kick off meeting	Pending Confirmation: 10 Aug	comp	1b	All	Project Restart; address outstanding deliverables	30 Nov	comp	2	Kirt	Site Survey form with site drawings	14 Dec	comp	3	Man	Servers moved, network ready for demo	Date available	comp	4	EM	Kiosks ordered, 1 sent for	Date available	comp
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# Using the Charter

- ▶ Send the charter to your own team and ask for clarifications, etc.
- ▶ Send the edited charter to the customer prior to the meeting.
- ▶ Set the agenda of the meeting as: Project Charter Review
- ▶ Go over every aspect of the charter, make changes and gain approval for first draft.

# Customer Meeting

- ▶ Receive back modified charter from customer.
- ▶ Send changes to your team
- ▶ Develop an agenda to include:
  - Final Charter Approval
  - Discussion of current state of project
  - Deliverables
  - Action Items
  - Next Meeting

# Workshop Wrap-up

- ▶ Answer the poll by picking a number from 1 – 10 to describe the quality of this workshop (10 being highest).
- ▶ Deliverables from this session
  - Complete the charter
  - Schedule time with Margery to review and rework your charter.
  - Sign up for part 2

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