PSA Security Network

PSA TEC 2016: Stakeholder Management - Strategies for Project Success

Executive Summary

PSA Project Management Committee

16

TEC 2016 **Stakeholder Management: Strategies for Project Success**

Executive Summary

The PSA Project Management designed and hosted a session for Project Managers to improve stakeholder communication and engagement throughout the project life cycle. Attendees learned to effectively identify and define project stakeholders, establish methodologies for continuous communication, and maintain project clarity when dealing with tight deadlines, limited resources, and changing project requirements. Attendees actively engaged in the conversation, contributing their experience and input in stakeholder management. Below is a synopsis of the discussion.

Project Scenario: There are many different types of projects and even more avenues for implementation, so for this session, the committee provided a common project scenario to create a common framework and keep the discussions on topic. The scenario is as follows:

- The end user is moving into a new location in a core and shell developed building and will be the sole tenant. The building has four stories and is located in an urban business district.

- There is an architect designing the fit out and he has been requested by the end user to hire a security consultant who is involved in the design and will sign-off on the finished project.

- The end user has multiple locations and the systems installed at this location will connect to an existing enterprise wide architecture. The systems involved are:
    - Access control which includes elevator control and parking management.
    - Video surveillance.

- The security contractor (you) will be working for the GC just like the other trades such as Electrical, Elevator, Structured Cable, IT, Door Hardware, Fire Alarm, and HVAC.

- The security contractor will have subcontractors and vendors.

- The security contractor will have a project team with PMs, design/engineering assets, installers, programmers, procurement, and accounting, among others.

- The security contractor will need to coordinate with the end user IT department and security department.

- The security contractor will need to interface with the GC for their contractors to provide and install security and network cable and cable pathways as well as all door locking hardware. The security contractor (you) excluded this from your scope but the spec just states provided by others.

Who are the stakeholders in this project scenario?

A stakeholder is defined as anyone who has a common interest or activity in the project. As the Project Manager (PM), it's your job to manage all of the project resources as to why they need to be involved, what tasks they need to accomplish, and when they need to have them completed. The first step in the process is to identify your stakeholders. Using the scenario outlined above, who are the common stakeholders?

- **End User,** the company that will be using the installed system. The end user will be providing IP's for all the controllers and cameras, switch ports, servers, workstations, users that will be trained on the systems, and card holder data input. Many times PMs forget the amount of involvement that the end user has in a project, such as the one above, and often the end user has many more deliverables than they anticipated. It's the PM's responsibility to drive those deliverables.

- **General Contractor (GC)** that is actually paying your company to install the system. One thing that you need to keep in mind on this stakeholder is that they are being paid by the end user. This is important because the GC doesn't care as much about you or the install. The GC just wants you to get it done so they can move on to the next project and leave you to cover the warranty. You are there long term with the end user and the GC is gone with the plumbers.

- **Security Consultant** hired by the architect (the architect only hired the security consultant because of the end user). The security consultant cares about how the system functions in relation to their design and what the manufactures told them it could do. This is one of the main stakeholders that you want on your side. They need to be one of your best friends on this project.

- **Architect** who has the building design and for the most part, did not put much consideration into security. The security was only put on the building because of the end user, who wanted the security. The architect placed the symbols on the drawing and maybe had some input on the door hardware per the security consultant. The architect cares about the looks and they don't care how it functions.

- **Subs / Other Trades** that you interface with on the install of the system. For example, the electrical contractor that provides power for your devices and sometimes is roughing- in your cable and conduit. The elevator contractor installing your equipment in their elevators and machine rooms – all of these trades need to be added to your stakeholder list.

- **Internal Teams** and resources within your companies are stakeholders as well (sales, client managers, estimators, startup, install, service, subs, etc.).

Why and when are these stakeholders important?

As we can see, there are several different shareholders, whom if not in sync, could potentially derail a project. Being able to determine why and when these stakeholders are important allows the PM to ensure that coordination/scheduling is done efficiently and carried out during the correct phase of the project. Some stakeholders will have several periods in a project when they are important. Using the stakeholders referenced above, let's consider why and when they are most important on a project.

- **End User** – This stakeholder is one that will be involved in several aspects of the project, including:

    - Coordinating with their IT department – (IP addresses, system architecture, switch configuration, MAC addresses, etc.)

    - Ordering any workstations/servers they will be supplying. These items are often needed prior to completion of install since they need software installed and configuration completed.

    - Coordinating employees that will be trained on system use. Without trained employees, they will not know how to use the system and the system will not be used properly.

    - Badging employees. Depending on the number of employees, this process could take several months to complete.

- Setting up access levels/time zones etc. The end user knows best which employees should have authorized access and when access should be granted.

- **General Contractor** (GC) – This stakeholder relays all information regarding the project to customer/end user. The GC is extremely important in the role of coordination among trades as well as scheduling. They also play an important part in collecting and distributing RFI's (Request for Information). Most contractors answer to the GC, who in turn, is the main communication channel to the end user. This stakeholder is important throughout the entire build process.

- **Security Consultant** – This stakeholder is responsible for conveying exactly what the end user expects from their system. Until the owner takes ownership, it belongs to the consultant because that is who is going to approve everything you are doing before it is handed over to the owner. They are typically involved most heavily during the design phase as well as the testing/commissioning phase.

- **Architect** - Architects typically care about historical buildings, turnstiles, camera placement, special requirements, or specific types of ceiling areas. Engineers can be grouped into architects because they have the same influence. It is important for the architect to be involved in the project and is considered a stakeholder because their involvement in the beginning of the project, during the design process, is huge. It alleviates several issues surrounding these areas if involved early in the design process or even before PM sees the project.

- **Other Trades (electrical/elevator/network/locksmith etc.)** – These trades are considered stakeholders due to the fact that the work they perform is vital to the success of a project. These trades must be coordinated with very early in the project to make sure they are aware of exactly what is needed by the security contractor. Many times, there are several things missed during project development that need to be clarified/completed prior to, during, and at the end of the project. For example, electricians will need to install conduit so that security cabling can be installed, locks need to be installed so security cabling can be terminated, and network needs to be setup/configured so the security system can come online to be tested.

- **Internal Teams** – There are also several internal divisions/groups within the security contractor company, all of whom are considered stakeholders and come into play at different stages of the project. The CAD team needs to create shop drawings. The procurement team needs to make sure that parts are ordered and delivered on time to meet milestones. Engineers need to be scheduled for device configuration, programming, etc. The internal IT teams that commission design and programming. The Sales team also has a significant impact the project from kick-off meetings to

communicating customer expectations and timelines to change orders, walkthrough, follow-up references, and identifying additional business opportunities. The PMs are responsible for the overall communication and coordination among all these internal players.

How and when are these stakeholders impactful?

Each of these stakeholders can impact a project in their own way. Understanding how and when each stakeholder can impact the project, allows you up to mitigate possible issues and help drive decisions in the right direction. Again, a stakeholder is anyone that is impacted by or impacts a project. Let's review how and when the key stakeholders identified for this project scenario are impactful.

- **End Users** – How are they impactful to a project?
    - Coordination with their IT department (IP addresses, system architecture, switch configuration, MAC addresses, etc.) – You are asking the stakeholder to be a resource for coordination. If there is lack of follow through or miscommunication, this can derail the project timeline and cost. There are many situations these days with no network, no cameras, or access control. You may not need all the IT information early in the project to get started, but you want to start this communication as early as possible to prevent any delays.

    - Ordering any workstations/servers they will be supplying. – In this example, you are asking the stakeholder to provide a deliverable that requires information from you, so you want to address this early in the project. If the required deliverable is not met, this will delay the project timeline and can add cost to the project.

    - Coordinating employees that will be trained on system use. – Training is one of the most important parts of a project. If you cannot get the end user to commit to having their staff trained properly, it can cause user frustrations and unneeded service calls.

- **General Contractor (GC)** – How are they impactful to a project?
    - The GC manages the project as a whole. They make sure all actions from each trade work in harmony, stay on track, settle disputes and manage outcomes. The GC can impact you in several ways… scheduling, owner/architect communications, safety, trade coordination and change orders. Basically, they are impactful throughout the project from start to finish.

- **Security Consultant** – How are they impactful to a project?

- A consultant normally is hired by the owner to manage the design of a system throughout the project and to make sure the end result meets the criteria for completion. They can make or break a project for an integrator. You need to make sure you fully understand the expectations of the consultant for each milestone so you can achieve success. The consultant is there to hold you accountable for your installation. The earlier you build a relationship, the better you will understand his expectations.

- **Architect** - How are they impactful to a project?
    - Architects are also seen as the owner representative. Their main focus is on the building design and aesthetics. An architect can impact how your products look in their environment. Knowing this, there are several things to know, such as historical requirements, colors, looks, etc.

- **Other Trades (electrical/elevator/network/locksmith etc.)** – How are they impactful to a project?
    - The impact of other trades is very large. You need to make sure you know when and who you need to communicate with each phase of our project. If carpet is going in, it has nothing to do with security, but it does create a problem if they block off the area you need to work in. You need power to the panel, so you need to communicate the need with the electrical. You have connection with the elevator system, so is there a path way into their controller? If you don't engage with these types of stakeholders, you will get behind and it will add hours to the project.

- **Internal Teams** – How are they impactful to a project?
    - Sales - You must work with your sales teams to make sure you understand the SOW. Salespeople can also be a resource to help communicate issues to the customer if needed.

    - Design/Engineering team - Depending on their role in your company, you can firm-up the job needs and make sure you know what it will take to complete.

    - Installation Team - Of course you need someone to install the stuff. This team is the face of your company throughout the project. They can help communication issues before they come to a head. They can push the schedule or slow it down.

    - Service Team – This team is normally left out as a stakeholder in a project. Make sure you keep these people in the loop on the project as they will be the team that inherits it. They can be directly impacted if you are working on a site that

already has your equipment. They can also impact after project support like remote access and system labeling.

What communications and interactions should PMs have with these stakeholders and when should PMs engage?

- Determine how your stakeholders preferred to communicate and how they communicate best.

- Attend owner/architect/contractor meetings, discuss security requirements, and comment on meeting minutes.

- Organize and coordinate meetings with interested parties (i.e. electrical, teledata, security) and page turn the drawing set, highlight key points, answer questions, and keep meeting minutes.

- Hold project kick-off meetings with internal staff, outline project requirements, list milestones and dates, and set expectations for team members. It crucial to get buy-in, seek objections from the team and handle those objection accordingly. Kick-offs can be a formal presentation, but keep it interactive, or it can be an informal chat. Try to do this in person.

- Email is not a good tool for the discussion. Use email to record the discussion and the agreement you've reached. Include response times and any expectation if no response is received by the stated timeline. Avoid all caps and be careful with the reply-all option.

- Use well-established PM reporting tools. These include, project schedules, responsibility matrix, drawing sets, device schedules, meeting agenda and notes, product data submittals, statements of work, request for information, field memos, project dashboard.

PSA Project Management Committee Tools & Resources

The PSA Project Management Committee has created and provided many tools and resources that can assist you with stakeholder communication, including:

Documents & Tools	Videos & Webinars
Tips for Improving Communication Best Practices for Navigating the Project Lifecycle Common Project Documents Change Order Log Template Unresolved Issues List Sample Weekly Project Update Sample Project Charter Sample Project Meeting Minutes Sample Responsibility Matrix Sample Risk Register Sample SOV	Communication Tips for Project Managers Solving Problems Through Effective Communication Forging an Alliance Between Operations & Sales