

Proactively manage the client-approval process to avoid schedule delays

Many different kinds of projects have milestones that require client approval of designs or plans before proceeding to the next project phase. For example, one phase requiring client approval found in many projects is *conceptual design*. One common mistake we've seen is project teams working independently of the client, delivering drawings or documents to the client so close to the scheduled approval date that any significant changes will create a schedule delay. Unless the team has performed to perfection, the client then feels caught between the proverbial rock and a hard place, with two unsavory options: approve something he isn't totally satisfied with, or create a schedule delay. Talk about an unhappy client! In this article, we'll give you some tips for working client approval time into your schedules so there are no surprises, but rather handshakes all around.



The client-approval dance

Although neglecting the client-approval process seems like a basic mistake you could easily avoid, we've seen both inexperienced and experienced project teams fail to plan for these key activities. First, we'll touch on reasons why your team might get caught in this situation. Next, we'll explain two approaches and strategies for fitting client approval activities into your schedule, making sure you and the client are always on the same page.

The roots of poor approval process management

Why do project teams put themselves in such a bad position? Often, they're too confident about their ability to deliver the perfect solution. Sometimes, they lack experience. Other times, they fail to validate the status of scheduled activities, showing poor schedule-management skills. Finally, the project team may be troubled by personality conflicts, poor planning, or poor communication inside the team and with the client.

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Reduce risk by eliminating surprises at approval time

You can avoid a schedule delay when seeking client approval for a design or proposal using two fundamental methods. One method is to schedule adequate time between a submission and milestone completion date to allow adequate client review time and also allow time for you to make major modifications resulting from the review. The other method is to periodically review progress and deliverables with the client prior to the sign-off date, so there are no surprises associated with the final submission, requiring only a short time for final modifications. This second method allows the client to incrementally confirm agreement with your approach and direction. The second method is our recommended approach. It's especially important to follow this technique on projects with complex issues. We'll outline some strategies that will work for either method.

Create a preliminary review activity

One of the techniques we've used to better manage approvals is to create additional scheduled activities such as "Review Preliminary Plan" or "Review Preliminary Conceptual Design." For example, this type of activity might be scheduled three weeks prior to the final review and sign-off activities. The primary advantage of this technique is that it forces the team to conduct a

preliminary review that will surface issues early, so that there may be enough time to address them before the final review.

Communicate the development of your ideas

You can take control of the approval process more easily by openly communicating with the client. For example, you can update the client at your periodic status meetings. You could also invite the client to specific team meetings to gain an understanding of progress, issues, and the rationale behind key team decisions. Finally, you could use product and technology demonstrations to update the client before a final approval is required. A common mistake in communicating interim progress is to think that all documentation needs to be perfect or complete. Not so! The main objective is to share where the team is headed and gain client alignment with the team's direction; you don't need every document to be complete to accomplish this. These three techniques

apply equally, whether the approving entity is a person, a steering committee, or an entire management team.

Maximize electronic and personal contact:

With widespread email and file sharing today, there are many opportunities for sharing sketches, spreadsheets, drawings, flowcharts, and other information. Sharing these allows the client to be aware of your intent, and acknowledge your direction and progress; however, it's hard to beat the feedback of face-to-face discussions.

How sweet it is!

Failure to obtain client approvals on schedule is a common cause of schedule delays. By managing the client approval process, the project manager can minimize the occurrence of these delays. Meeting the client's requirements and having open communication are two key contributors to avoiding last-minute surprises. Plan your way so that you can hear these sweet words: "Good job. Just what I wanted. Where do I sign?" 🌐

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Quick Tips

Improve your networking memory

When dealing with clients or potential clients making a good first impression is key — as is being able to remember your first contact with a potential customer or associate. At your next conference, try these networking tips:

- Wear your nametag on the right side of your chest. When you shake hands, it will be easier to read than if it were on the left.
- Soon after you make a new contact and exchange business cards, write a memory jogger such as the date you met on the front of the person's card.
- File business cards in a specially designed book, or better yet, use a business card scanner to put them in your contact list.

Minimize daily interruptions

Managing people, processes, and technology is no easy task and demands focused brainpower. It can take up to 20 minutes to get back to where you were after a simple interruption. Minimize interruptions by using some of these ideas:

- If you have an office, close your door.
- If you work in a cubicle, put up a sign warning your coworkers that you're in "Crunch Mode" and don't have time to chat.
- Set your phone to go directly to voice mail. Then, respond to voice mail messages at set times during the day.
- Close your email program completely and check it only a few times a day instead of each time a message arrives.
- Clear your desk of everything except the materials you need to accomplish the task at hand.

4 steps to cinch a successful security officer

If you're in the market for a security officer (SO) or want to ensure your current officer has the right stuff, here's some help.

Key idea: Find a leader who can take the security reins without letting your office fall off the compliance path. A successful SO strikes a delicate balance of technical savvy and people skills. Follow our experts' key steps to ensure the perfect fit for your office.

1. Put technology in the forefront

"Choose someone with solid technical credentials," advises Fred Langston, principal security consultant for VeriSign in Seattle. For example, your SO could be an official Information Technology (IT) employee, because security issues involve technical expertise. If you don't have an IT team, you can tap a tech-savvy staffer, says Paul Litwak, an attorney from Virginia Beach, VA, in the publication he co-authored, *A Path To Compliance With The Security Rule*.

Whether your SO has a history of solving tech problems, is an actual IT staffer or makes management decisions, you'll want to ensure the position is identified as 'management,' Litwak notes. That's because:



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1. Security is an office-wide process, extending beyond the security rule's requirements;

2. Your SO has to provide your staff with access to appropriate information while targeting — and eliminating — potential security risks.

3. Your SO needs access to all your office's resources.

Essential: Your SO must be able to visualize how office staff is using technology — and where your high-risk areas are, stresses Frank Ruelas, compliance officer at Gila River Health Care Corporation in Sacaton, AZ.

2. Choose someone with a successful project management track record

"Security is not a one-time occurrence," Ruelas adds. This means that even after your SO puts the appropriate security rule requirements in place, she must be on the look out for new threats or ineffective controls, he says.

Tip: Find someone with experience in risk management. This helps you not only reduce the security risks, but this person will understand the link between risks and organizational costs, advises Langston.

And remember, while you have to designate one person with the



final authority to steer your security rule compliance program, you can delegate security responsibilities among your office staff, notes Litwak.

Good idea: If you have the resources, send one or more people to technical security training programs to keep up with developments in this specialized field, advises Litwak.

3. Prioritize communication skills

Your SO must be a "bridge" between the techies and non-technical folks in your office. If your employees find the SO unapproachable — or are intimidated by her techspeak — they are less likely to share their observations, adds Litwak.

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People need to feel they can voice their concerns in everyday language without hitting a wall of technical jargon.

Example: Instead of spouting computer code, you need someone who can say, “We have a weakness in the system and here’s the risk [we face],” says Langston.

4. Choose a captain for uncharted waters

SOs must be on the lookout for ways to balance daily functions with ever-changing security situations, Ruelas observes. Therefore, you’ll need to choose an SO with the flexibility to think and plan innovatively. 🌐

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When disaster strikes, make your service providers work for you

They may be offsite, but they should not be out of mind. Your third-party service providers are critical to your daily functions, and as a result you can’t afford to forget about them in an emergency.

The good news: Taking full advantage of an outsourcing relationship can be a bonus to your back-up strategy.

When it comes to disaster planning, too often institutions make the mistake of assuming third-party responsibilities are not their own, says **Ken Pfeil**, CSO at NYbased Capital Q, a provider of Web-based financial information and services. “You still do have to worry about” the functions those companies provide, he stresses.

If your internet service provider has a business disruption and does not have a backup plan, you’re whole website could go down and your company could suffer because of lack of planning on the part of the third party. **Lesson:** No matter how great your plan is, “your service provider could screw you up,” notes **Cynthia Bonnette**, director of information security risk assessment for NETBankAudit, based in Alexandria, VA.

That’s why you must be clear on the roles of your third party service providers when you’re taking stock of your Business Continuity Plan (BCP). You must assure that they have contingency plans in place for any disruptions they encounter, just as you do. Outsourcing can be a bonus when those contingency plans overlap. **Opportunity:** Consider how your service providers might help when your company is in need.

Example: A company that runs a third party’s telephone software might look to this outsourcing relationship in the event of a disruption that halted business at the company location, explains Bonnette. The vendor could possibly provide back-up

phone capabilities from its location while the company location is nonfunctioning.

How to proceed: Call up your service providers, tell them your needs and come to an agreement on any contingency plans. These plans should include contact information and a firm outline of who is responsible for what in case of an emergency. Once you’ve settled on this approach, it should be documented as part of your BCP, Bonnette advises.

Lesson learned: Don’t be afraid to look to your third-party vendors as a source of assistance with business continuity planning, but do prepare for — and document — the agreement ahead of time.

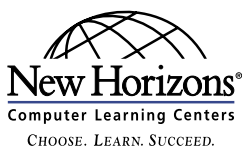
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