

# INSIDE PROJECT management

## Tools of the Trade Engaging the organization using force field analysis

by Glenn P. Kessler

Technical projects take place in a broad organizational context. A technical project's success generally depends heavily upon non-technical issues. Leading the project team and holding the technical vision for the project are only portions of the project manager's job. Working with stakeholders to understand the business needs and the pressures for and against project success are equally critical project management responsibilities.

This article focuses on a simple and powerful tool, force field analysis, which helps you understand the organizational

context in which your project travels and prioritize both the hidden obstacles on which it can flounder and the positive forces which can drive it forward.

### Is the force with you?

In this article, we'll walk through a force field analysis used to kick off a technology-oriented strategic planning process. In the first part of the analysis we'll clearly define the goal or "ideal state" to be achieved through the project. We'll next identify and quantify the forces and factors that could support or undermine reaching this ideal state. Finally, we will

use a graphic to represent the results of the analysis. This representation can be used to develop a prioritized action plan that reinforces the positive factors and eliminates the anticipated barriers and bottlenecks.

### What to expect

The force field analysis described below took the project team about 90 minutes to complete. It was well worth the time and effort. Specific benefits include the following:

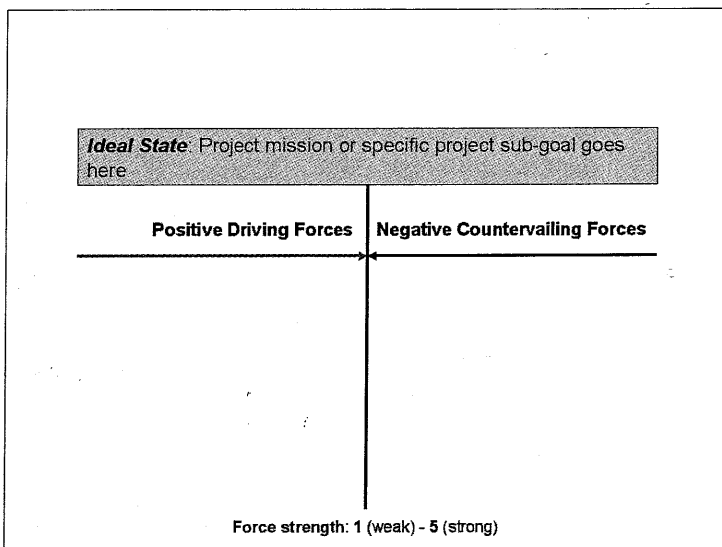
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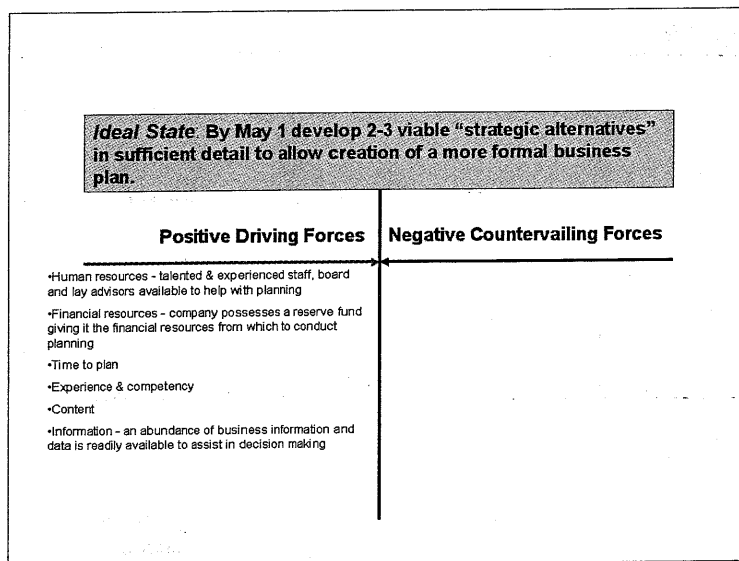


**Figure A:** A force field analysis is used to identify and quantify potential sources of project support and interference.

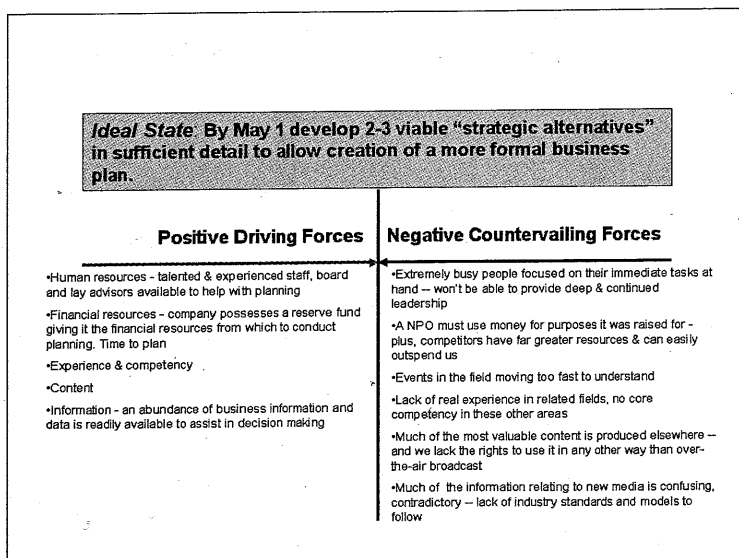
- Presenting positive and negative forces in a format that permits meaningful comparison and stimulates discussion
- Encouraging the project team to think together about *all* factors required for success
- Facilitating relative prioritization of factors on both sides of the ledger
- Providing prioritized data useful in identifying and mitigating project risks

## Define the "ideal state"

The first thing to do is to define the goal of the planned change or the ideal state. By clearly stat-



**Figure B:** Start discussing the political framework of the project to stimulate discussion on positive driving forces.



**Figure C:** Project barriers push against positive driving forces.

ing what the situation will be like when it's solved, you'll give the team members the right focus. With the project team present, draw a large "T" on a flipchart with a description of the "ideal state" at the top, as shown in **Figure A** on the cover. The tail of the T represents the ideal state toward which you are driving.

The ideal state should flow directly from the project charter. It's generally a restatement of either the project mission or a specific sub-goal derived from the mission.

## Identify and quantify the forces

Now, brainstorm forces that drive the project *toward* the ideal state, as illustrated in **Figure B**. As an example, we'll fill in the force field template using data from a recent project in which we helped a not-for-profit communications company build a long-term business plan.

There are a number of tools that can assist you in identifying key players and stimulating discussion about positive forces. One useful approach is diagramming the "political framework" of the project as discussed in "Sound strategies for managing project politics" in the December 2001 issue. Questions such as the following can energize the discussion:

- Are there key stakeholders who substantially benefit from the stated goal?
- Are there influential advocates who will proactively support the effort?
- Will the project deliverables remove sources of particular pain for executives, managers or customers touched by the project?

Next, brainstorm obstacles that could undermine or inhibit movement toward the ideal state, as shown in **Figure C**. These are the barriers that can derail the project. A political framework diagram will again often point to potential project inhibitors. If the brainstorm begins to falter, questions such as these might help get the creative energy flowing:

- Does the appropriate level of organizational commitment exist?
- Does the company have the ability to follow through on its commitment to the project?
- Are key players overcommitted in other areas or to other projects?
- Are the required sponsors and advocates fully onboard?

After brainstorming the positive and negative forces, go back and indicate the relative strength of each force using a numerical scale of 1 (weakest) through 5 (strongest). Use arrows of different lengths and colors (the longer the arrow, the stronger the force) to graphically represent force strength as illustrated in Figure D. This provides both another opportunity for the project team to consider the forces in more detail and a picture of the broader project context.

## Graphically represent and prioritize the results

A force field analysis can help the team focus its energy effectively. In many cases, the most effective way to move a project forward is not to augment a positive force (i.e., add more coders) but to remove a negative one (i.e., reduce external commitments of a team member or bring a reluctant stakeholder on board as an advocate). A *magic quadrant*, like the one shown in Figure E, can be useful in evaluating and prioritizing the results of the force field analysis.

This diagram helps the team prioritize organizational challenges by looking at their importance to project success against the difficulty of turning them into opportunities. A similar analysis could be performed with the positive forces associated with the project.

The upper-left quadrant contains factors that are both significant barriers to project success and relatively easy to remedy. These issues deliver maximum impact for minimum effort and should be a central focus in engaging the organization. Conversely, the lower-right quadrant contains issues that are both difficult to resolve and have a relatively low impact on project success. Effort directed here would be better spent elsewhere. Issues in the remaining quadrants should be dealt with on a case-by-case basis.

## Go forth and engage the organization

Failure to attend to the organizational context of a project is always dangerous and often fatal. In this article, we've developed a simple and useful tool that allows you to test your organizational waters, identify forces likely to support or block project

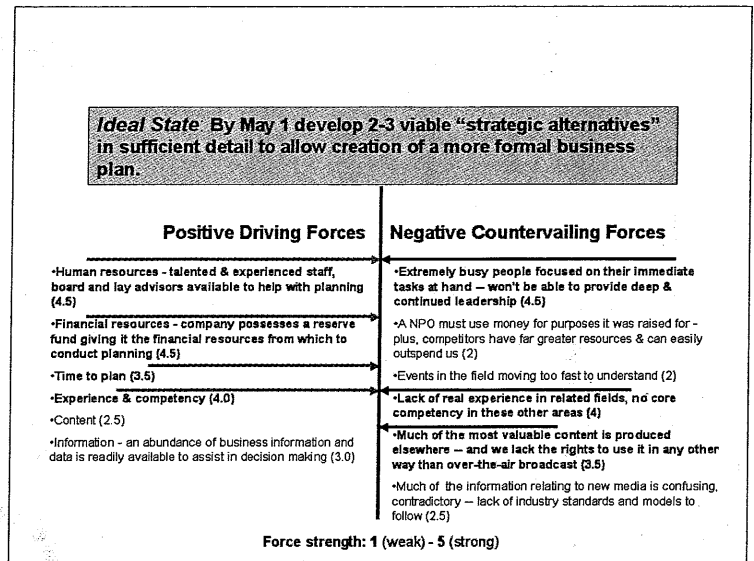


Figure D: The completed force field analysis also compares the strength of the forces.

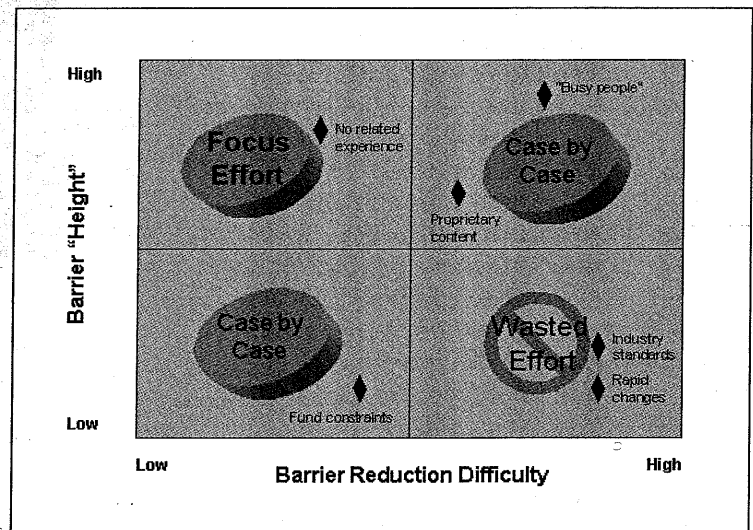


Figure E: A barrier evaluation, or magic quadrant, can help prioritize attention to the force field results.

success, and prioritize their importance. It's easy to use, it fosters productive discussion among project team members, it yields valuable data, and, most importantly, it keeps your team focused on the organizational context necessary for project survival. \*

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