
Your “duty of care”

Transformation Leaders

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Introduction

This talk is intended to share some non-technical experiences from the past 25 years or so of running a consulting business.

The intention is to help other people, especially in these uncertain times. I hope it's useful.

My business has been leading systems and infrastructure projects, many of them involving VMS based disaster-tolerant systems. It's usually technically complex and demanding work with a high level of responsibility. I prefer to describe myself as a “consulting engineer”, not a “consultant”.

The importance of your “duty of care”

- All projects come with responsibilities.
- What are yours, what are the client's ?
- Where are the boundaries ?
- Understanding your “duty of care” brings clarity and helps you make decisions.

Reputation, ethics and values

- The ethics and values of the people you choose to work with have to match your own, then you have a sound basis for trusting each other.
- Do the right thing, consistently.
- The contractual documents are there in case you need to refer to them. Keep track of changes over time.

Key questions at the outset

- Do you want to get involved with *this* project for *this* client ?
- Will you be able to make a worthwhile difference *this* time ?
- Do you like them ?
- Is it interesting enough ?
- Do you think they are capable of what they want to do ?
- Are you prepared to carry the responsibility ?

What is “consulting” ?

- Problem solving in one form or another is at the heart of what most people in business actually do.
- Consultants usually get asked in when things are complicated and difficult. It's never the easy stuff!
- Improving our ability to find solutions to problems for other people will usually bring better business.
- Better business is much better than more business!

Structure your thinking

- Your brain is your primary tool - keep it in good shape.
- Work with other people, never work alone.
- Have a process that you can follow, be consistent.
- Record your decisions, especially ideas you rejected.
- Most decisions require good judgement.
- Usually you have to make assumptions to get started.

Key points

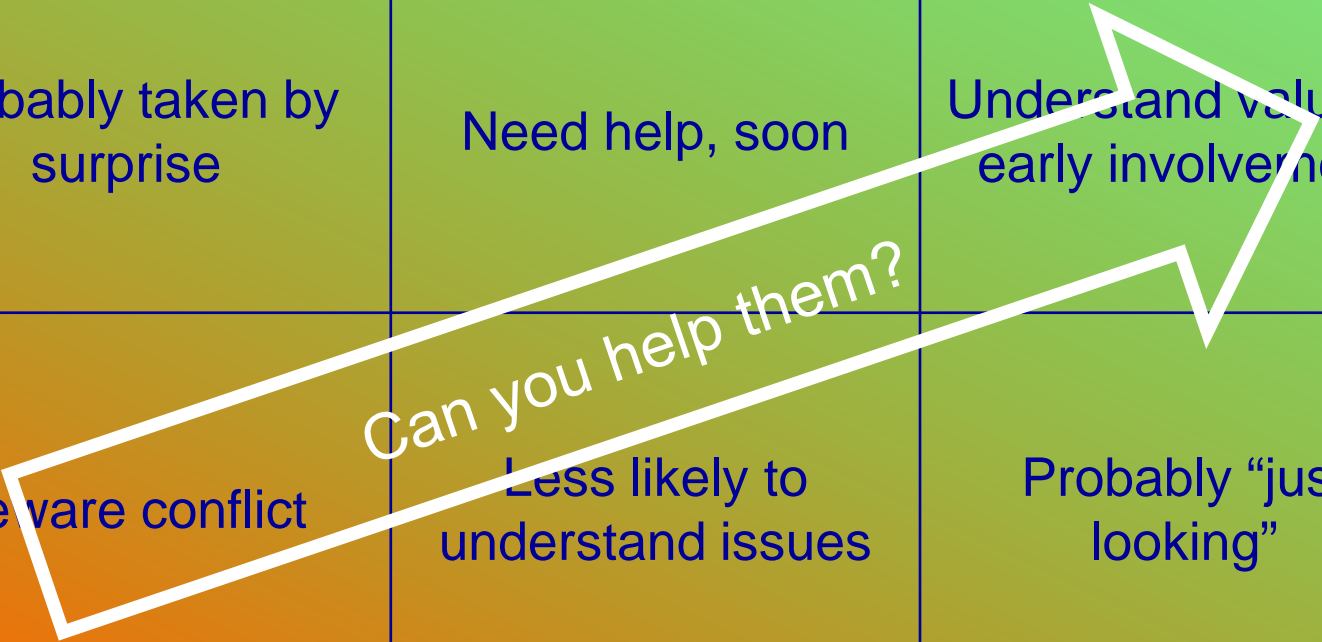
- Build your knowledge base.
- Increase your depth of understanding.
- Gain insights into your fields of expertise.
- Improve how you communicate your ideas.
- Know people you can discuss things with and can trust to help you when needed – and do the same for them.

Clarity of purpose

- Initial discussions.
 - Proposal and negotiation.
 - Statement of Work.
 - Terms and Conditions.
 - Costs.
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- Fixed price project based work.
 - Limit risk for all parties.
 - Commitment from all parties is essential.

Do you want to take this on ?

	Crisis	Normal	Planning ahead
Value driven	Probably taken by surprise	Need help, soon	Understand value of early involvement
Cost driven	Beware conflict	Less likely to understand issues	Probably "just looking"



Project direction

- Project leadership:
 - Ensure that everyone involved maintains a consistent understanding of the project. Plan ahead as best you can.
- Budget and Schedule:
 - They have to be appropriate for the problems you're trying to deal with. Don't set them first!

Leadership

- Your colleagues will often have better ideas and insights than you will, so be prepared to let go.
- There is no room for passengers – everyone has to be committed to the cause and actively contribute.
- Do other people the courtesy of meeting them in person if you can. Use the phone and listen. Avoid late night rushed email! If in doubt, pick up the phone.
- Remember to thank people – it's so effective!

Planning and implementation

- Estimating and planning are key
- You cannot know everything up front
- Make effective assumptions to get started
- Beware assuming that everything will go well
- Cumulative discrepancies add up very quickly
- How will you monitor progress ?
- Checklists are essential, especially under pressure

“More software projects have gone awry for lack of calendar time than all other causes combined.”

“The mythical man-month” – Brooks

Management

- Concentrate on quality of information and decision making
- Be thoughtful, not reactive - do not rush to respond
- Regular briefings, in person, phones off, no e-mail
- Need people to be committed and involved
- Never have one person working on their own
- Find good people, guide them and trust them
- Good administrative support lets people focus on their work
- Good management enables people to get things done

“Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity.”

General George Patton

Leadership and people

- Build groups of excellent people who work well together
- Choose people who are willing to share information and help each other
- Give them the support and help they need so that they aren't distracted by trivia
- Confidence good; arrogance bad
- We're all in this together!

“The best executive is the one who has sense enough to pick good people to do what he wants done, and self-restraint enough to keep from meddling with them while they do it.”

Theodore Roosevelt

Procurement and responsibility

- Procurement – must do enough work up front:
 - It's not just about cost
 - Understand what is technically feasible
 - Understand what is strictly necessary
 - Clearly establish the scope
 - Define clear objectives
 - Define clear acceptance criteria
- Avoid split responsibility.

Duty of care

- Understand your “duty of care”, then you have a good basis for making decisions.
- Teach as you go, passing on knowledge and experience, but letting them do things their way, not yours.
- Don’t become a single point of failure.
- Think about succession planning and how to quit without inconveniencing any of your customers or colleagues.

See “The Trusted Advisor”, by Maister

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