



TenStep Supplemental Paper

19 April 2002

Managing Resources in a Matrix Organization

One of the frustrating parts of being a project manager is that it can be difficult to manage the project when you have no formal management authority over the members of your team. From an organizational perspective, if the people do not report to you as a functional manager, then you are probably operating in some type of matrix structure. The matrix makes the most efficient use of people resources, but it can also be very challenging on the part of project managers.

How do you hold team members accountable for their deadlines without this authority?

I think that in most organizations, the project manager is responsible for the project, but not necessarily responsible for the people. The people still belong to a functional manager of some kind. If you have the project team assigned to you full time, then you come close to having control. If the team members are not assigned to you full time, then this becomes more difficult.

People Management

From the people side, although the team does not report to you functionally, their work on the project should still be input into their overall performance review. So, you can try to hold people accountable by making sure they understand that you will be providing performance feedback into their review. This should also be reiterated by and agreed to by the functional managers. (You may or may not have the ability to make this happen in your organization.) You can also discuss project performance with the functional managers. If people are not meeting their deadlines, then perhaps it is a combination of your feedback, as well as the feedback from the functional manager that is needed.

Of course, also on the people side, you must also make an evaluation as to why people are not meeting deadlines. If it because of a lack of skills, this should be addressed through training or replacement resources. If it is because they do not fully understand the expectations you have, then you may have some changes to make as well.

Process Management

From a process side, there are project management techniques and processes that should be utilized. First of all, if the availability and performance of the team is in doubt, you should raise this early as a project risk. As part of risk management, you need to put a proactive plan in place to make sure that this risk is addressed. When people miss their deadlines, you may need to raise an issue and perform issues management. During issues management, you again look for the cause of the problem. Are people missing deadlines because they are being pulled from your project to do other work, such as application support? If so, this may need to be addressed one way. Are they missing dates because the initial estimates were too low? If so, then that needs to be addressed another way. Are they missing dates because of performance problems? Again, that needs to be addressed a third way, with the help of the functional managers. Since you do not have authority over



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the resources, you may need to get help from the functional managers and human resource department to effectively deal with performance problems.

In addition, make sure your team members are communicating proactively with you. In many cases, it is not the fact that people miss their deadlines that gets us frustrated. It is that they never tell us or give us warning. If a team member has a deliverable due at the end of the week, but then he or she gets pulled into a three-day resolution of a production problem, he or she needs to let you know so that you can take any appropriate actions you need to do. If he or she just misses the date and does not communicate, then he or she is not managing expectations as should be done. By the same token, you need to communicate proactively as well. Communicate well with your team and make sure they understand dates and expectations. Also communicate proactively with the functional managers and make sure they know when there are resource sharing issues or people performance issues.

Summary

In summary, matrix management involves a complex and delicate balancing act between project managers and people managers. The project manager usually has limited people management authority in these situations. And yet it is possible to complete your projects successfully. There are many project management processes and techniques that can help. Utilize them to raise risks and issues early and often. Also, make sure you utilize the project sponsor. After all, it is his or her project. He or she can help you generate the urgency and focus and can also have an impact on the functional managers to make sure that you, and the project, are successful.