Day 1 Introduction to workshop topic

Abstract: Organizational Teaming for Joint Project Pursuit

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Joint project teaming brings together different organizations with diverse capabilities to satisfy a customer need competitively. An “A” team covers all the project bases with specialty expertise, capability, and experience, presenting no weak spots. Appreciating and seeking the values of joint-team strength can be inhibited by organizational culture, tradition, and politics. Finding appropriate team members that can fill the technical gaps, improve proposal reception, and/or deliver superior results can be problematic under time pressures and the hurdles of new-relationship trust and respect development. There are awesome resources available for A team configurations.

What are the values of joint-project teaming that can out-weigh the obstacles? What are the obstacles? What requirements must be satisfied to encourage and realize beneficial teaming relationships? How might joint-teaming opportunities be enabled and facilitated to compelling benefit?

This workshop will open the dialog, explore the opportunity, and identify means for advancing the pursuit of organizational joint-project teaming.

KEVIN FORSBERG, OGR Systems, Inc

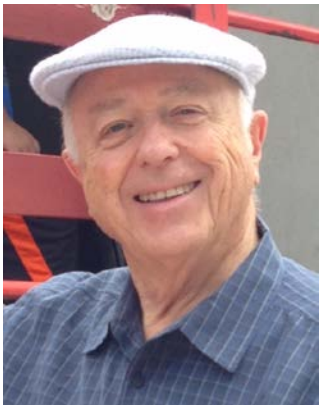
INCOSE Pioneer, ASME and INCOSE Fellow, INCOSE ESEP

- Co-author of ***Visualizing Project Management***, J. Wiley & Sons, (1994, 2001, 2005)
- Co-author of ***Communicating Project Management***, J. Wiley & Sons, 2002.
- Co-editor of the ***INCOSE SE Handbook***, versions 2a, 3.0, 3.1, 3.2, 3.2.2, and 4.0
- Author of the **Vee chart** and its elaboration (1989 to present)

Dr. Forsberg draws on 27 years of industrial experience in systems engineering, project management, and proposal management, and 33 years of successful consulting to both government and industry. His experience ranges from research projects, to development efforts, through to full-scale production implementation. Since 1983 he has provided training and consulting to both government and commercial clients. He specializes in systems, hardware and software project management, and the related processes, techniques, and skills essential to achieving predictable project performance. Dr. Forsberg has presented one- to two-week seminars in over a dozen countries.

Career Highlights:

- Member of the Lockheed Corona Project, America's first successful satellite (1956-61)
- Manager, Solid Mechanics Laboratory, and Deputy Director, Materials & Structures, Lockheed Research Lab, Palo Alto, CA
- Lockheed Program Manager of the Space Shuttle tile project for seven years, from research through full-scale production
- Lockheed new business division, proposal manager on major bids
- Lockheed Program Manager of the Space Station Program (Phase A)
- Co-founder of and active participant in two consulting and training firms: Center for Systems Management and OGR



Organizational Teaming for Joint Project Pursuit

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- (Discussion Food For Through)

- Why do organizations want to team anyway? Examples:
  - Political (Competitive) Advantage:
    - Space Telescope guidance & Pointing: Lockheed used Bendix Corp. (vs world-class in-house Lockheed team)
    - Selling Space Telescope to Congress: NASA & International Astronomers as a "team" ("Hubble Wars")
  - Spread the Risk:
    - Iridium LEO satellite-based phone system: $5 billion project sold for 2% of investment
      - Team: Motorola, Lockheed, others…
  - Others?
- When should organizations have teamed with another with different expertise?
  - On Galaxy note 7 phone should Samsung have teamed with battery experts..?
    - Previous battery problems: Nokia (≈2000), PC battery fires (≈2006), Boeing Dreamliner (2012)
  - Augment a good technical team with another which has vital PM and SE skills
    - Example: "Lunch Bucket" an excellent idea, but 9-year development allowed competitor to capture market first.
- Problems in Teaming
  - Forced marriage: Lockheed Missiles & Rockwell (HRSI)
    - Product (mullite) provided by Rockwell's partner, GE, failed in NASA test; NASA directed Rockwell to use Lockheed
    - Rockwell negotiated a contract with Lockheed; then Rockwell president spent 9 months trying to cancel..
  - Project is solid – but not in company's prime line of business
    - Use of space shuttle tiles for automotive exhaust system: application proven, but wrong business model
- Objectives for teaming
  - Increase competitiveness; augment breadth of technical competence
  - Sell a program – fight later about who does what
  - Spread the risk

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Additional Ideas:

1. Under utilized resources (southwest reginal)
2. SBIRs
3. Return on investment
4. How to make it sustainable
5. Culture change
6. Keep dialog and small group discussions
7. Apply systems engineering to solve the problem to help the region
8. **Objective: define the problem/opportunity statement**

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Day-1 Brief Out (as decided Friday, subject to change during Saturday)

Planned Primary Workshop Issues to Explore

- **Underutilized resources in the southwest**
- **Return on investment**
- **How to make it sustainable**

Potential Secondary Workshop Issues to Explore

- **Culture change**
- **Keep the dialog open in small discussion groups**

Objectives

- **Define the problem/opportunity statement**
- **Apply systems engineering to create an architecture to address the problem to help the southwest region**

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Day 2 Brief Out

Objectives for Saturday

- Define the problem/opportunity statement
- Apply systems engineering to create an architecture to address the problem to help the Southwest region
- Propose action plan

Problem Statement

- Example:
- Northrup Grumman – Remote Site
- Challenge: Small team, doesn't have access to system engineering thinking. Have handbook but don't know how to interpret, rationale behind what is recommended.

Work challenge that requires systems engineering process requirements. Corp mandate to follow system engineering practices but no procedures given.

Faced with learning on your own.

The rest of the story

- Investigating if INCOSE can help provide knowledge, help in getting up to speed.
- Would like help from within the region.
- Sustainable systems capability at this site.

Some General Considerations

- Identify the players
- Define needs/motives that each player will want to engage.

- What kind of sustainable mechanism could be put in place to provide a usable description of organizations and capabilities?
- What kind of sustainable mechanism could be put into place to provide a place/time where people can learn/develop potential relationships?

Issues

- Appropriate scaling of engagement
- Significant learning cycles to practice joint pursuits.
- Champions always needed.
- Aly's story: Conversations at state level for exploiting joint pursuits has occurred before with no following actions. Is an RCCA warranted?

Action Plan

- Exploit Two Potential Joint Pursuits For Region based opportunities
  - Use SE practices to capture the mechanisms, structures, exchanges that occur to describe any architecture that comes out of the activity.
  - Look for any patterns that emerge
  - Write paper on how the architecture works, and conops
  - Socialize with stakeholders within region