

## 26. Andy Walker, Sandy Cobb & Jay Hicks, Matt Morey: Military Transition – Joining the Ranks of Project Management

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**0:00:04 Matt Morey:** The military is a completely different culture and they're coming out of that environment into a civilian world, and it might as well be a different world.

**0:00:13 Andy Walker:** I think a lot of people that transition out of the military put themselves at a position of weakness because they haven't taken the time to think about this and really understand how marketable they really are.

**0:00:22 Jay Hicks:** The Project Manager is where the rubber meets the road in the commercial industry, and you need a leader to be able to make that happen effectively.

**0:00:30 Kendall Lott:** In the US, hundreds of veterans exit the military and enter civilian life everyday. It's a hard transition and among the greatest challenges is finding a job and a career. For this podcast, I spoke to a few veterans who were very successful in their transition, and one civilian contractor with the Department of Defense. The common view held by all of them is that these veterans represent a well-trained, largely untapped reservoir of human capital, and that Project Management might be the ticket to their future success. Listen to their ideas and the ways that they have been trying to help as well as some suggestions for the PMI chapters and how they can reach out to local veterans and businesses for a mutually rewarding outcome. You will also hear some of the very interesting uses of Project Management under pressure.

**0:01:15 Speaker 5:** From the Washington DC chapter of the Project Management Institute, this is PM Point Of View, the podcast that looks at Project Management from all the angles. Here's your host, Kendall Lott.

**0:01:27 KL:** Andy Walker is the 2016 Vice Chair and Chief Operating Officer for PMI WDC. He served six and a half years as a communication officer in the Marine Corps, serving in Bahrain, Iraq, and Washington DC. Today, Andy is a Sales Executive in charge of federal SAP sales with Deloitte Consulting. He spoke to me about the long arc to his aha moment. When he realized that Project Management was in fact, what he'd been doing all along, and the steps he took to position himself in the civilian market.

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**0:01:57 KL:** When did you recognize that project management was something you were doing?

**0:02:01 AW:** I can't tell you exactly what point it was. Being a communication officer, I probably was more attuned to it than perhaps a lot of military officers would be, but I would say at the Staff, NCO, or officer level, everyone absolutely is doing project management whether they realize it or

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not. For me, I was charged with leading a detachment of Marines who go to Shaikh Isa Bahrain and to help stand up airfield communications for C-130 squadrons that were providing support missions for Afghanistan. That was the project, putting that whole together, managing the logistics around that, executing, ensuring the health safety and well-being of those individuals as well as all the equipment that we needed to be successful on our mission. And subsequently, I was deployed to Iraq. So, I was a part of the initial ground invasion of Iraq in 2003 and with that, was with a group providing forward army refueling points and support. So, the helicopter squadrons that were providing close-air support for the infantry. We were providing them the fuel and the ammo and the ordinals that they needed. And my mission in charter was to ensure they could communicate and do so effectively.

**0:03:05 KL:** In this where you're tripping over project management?

**0:03:07 AW:** Yes.

**0:03:07 KL:** Techniques, if not the actual title, at that point?

**0:03:09 AW:** Yes.

**0:03:09 KL:** So, tell us a little bit about some of the typical techniques you might be using in that context, during your time of service. What looked like project management?

**0:03:18 AW:** So there's two types I'll say in the military. There's the tactical type of project management where I'm in the field, I'm managing whether it's a training exercise, whether it's managing an actual mission in combat. We've got a scope, a clear mission, what we're being asked to do. In the case of Iraq, we're being asked to stand up these forward arming refueling points. We didn't exactly know where we were going, we didn't actually know when we were gonna go there, but we knew we had to charter that we needed to keep our command up in communicating. I had the commanding officer of our squadron sitting in the same vehicle as me as we would move in a convoy, a convoy of 135 vehicles with aviation fuel and ordinals floating all around us. And my charter mission was keep us communicating both within each other and externally with other adjacent commands and units. And so, that's one aspect of it.

**0:04:08 KL:** Well, that sounds operational.

**0:04:09 AW:** It does.

**0:04:09 KL:** More than like an idea of a temporary endeavor with this progressively elaborated and comes to enclosure.

**0:04:15 AW:** I think in the part that even though it is operational what we're doing from day to day, we still have a temporary endeavor in mind that we needed to stand up a forward arming refueling point to a specific place. And so, we're doing that, once we figure out where that place is, we know what our general mission is. And then, we've got a series of tasks that we need to complete in order to be successful in that. So, we did wind up camping out in one place a little south of Baghdad where we were chartered with standing up our forward arming refueling point. And just getting that up and off the ground and operational in itself was a project, in the most tactical sense that you could come up with.

**0:04:50 KL:** Now, I'm really interested in that and how you would reflect on that. If you think about the PMBOK for just a second.

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**0:04:55 KL:** You do know your scope, it sounds like.

**0:04:56 AW:** Yes.

**0:04:56 KL:** Except you don't know where it's gonna be performed.

**0:04:58 AW:** Yes.

**0:05:00 KL:** How does that... I didn't even know where to see that in the PMBOK. I guess it's kinda technically part of scope. How is it to reflect for a second, you've been out of it for 10 and a half years now? Consulting field, how was it to do a project where you don't know a key element, like where it's actually happening, or does that matter?

**0:05:16 AW:** Well, I think it does matter. I almost look at it in the terms of risk. So, you've got your known risk, your [chuckle] unknown risk and so this could kinda fall into the category of unknown type of risk. I have an idea what I'm gonna be doing; but based upon where I am is going to change the scope of how I provide the service that I need to provide. Am I in range to be able to provide long-range HF radio communications back to other bases? Depending upon where I am that may or may not be feasible. It may change the trajectory of what my primary means of communication is. I might defer more to satellite communications at that point. Depending upon what other commands are co-located with us may dictate if we're able to get full on computer and LAN connectivity, because we're somewhat dependent on each other to be able to tap into things like terrestrial land shots and satellite uplinks. So, our charter and our mission is: Provide communications in as quick and expedient way as possible, in the most comprehensive way possible, given a varying location, [chuckle] and being under duress. So, you make the most of what you're offered.

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**0:06:27 KL:** What is the other type of project you faced?

**0:06:28 AW:** The other one I would say was more garrison, so it's gonna come more of the office environment, where you perhaps, after your command post, you're on a base, stationed somewhere. An example that I'll give there is that, for my second tour of duty, I was stationed in Marine Barracks, Washington, 8th and I, right here in our nation's capital. And that is home to the oldest post in the Marine Corps, founded in 1801, and the commandant of the Marine Corps. I had his personal residence on my network, and we have a lot of other cool thing, which was cool in itself. Good resume builder.

**0:06:55 MM:** Don't be wrong.

**0:06:56 AW:** That's right. [chuckle] Exactly. Exactly. And we had other interesting support elements of the Marine Corps to include the President's own United States Marine band. And during the time

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that I was there, there were several actual projects. They were called projects, labeled projects, going on, including the major renovations of the telecommunication and infrastructure of the commandant's personal residence, as well as the stand up and construction of a new hall, dorm hall, and performance hall, for the United States Marine band. So I was charged with part of the scope of the broader project plan in helping to stand up all of the garrison communications for those endeavors.

**0:07:40 KL:** So, when did you recognize in these projects, you said you had a little more insight into that earlier, being a communications officer.

**0:07:46 AW:** Yes.

**0:07:46 KL:** When did you start seeing, "This is a field, and it's a field I could enter, when I take off the uniform"?

**0:07:54 AW:** I think, for me, where it clicked most, was really more on those garrison projects, because at that point, you're doing things that are more readily apparent and transferable to what you would be doing out of the military. So, we had other contractors with us, we had other government GS employees with us. And by their rules and definitions we're project managers, program managers, so, we were ingrained with it. We had a project plan to help manage the activities that we were doing. And you had no choice but to realize what you were doing was project management. And I think as I started to get exposed to projects like that, it helped me reflect and realize that "Boy, I've really kinda been doing this all along. It's just been different arenas, and different scopes of projects that I've been tackling."

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**0:08:45 KL:** So, do you have a sense that others saw that like you did?

**0:08:49 AW:** Naturally people that are around certain fields, like logistics, communications, are probably gonna get it a little bit more. But really, there's certain things that we do, whether it's to guide a mission. A mission could be considered a project. It's got a short-term duration, definitive scope that you need to go execute. And there's a number of ways, across all the different specialties in the Marine Corps, and any military branch, that you're asked to do those things, whether it be leading a task force, managing the support of a major base event that's going on.

**0:09:25 AW:** One example when I was at Yuma, we were the command that would support a multi-year exercise; weapons, tactics instructor course, we'd bring all the aviators throughout all the Marine Corps together for a major training exercise. And it was a project. There was a lot of plan that went with that. We had a scope as far as, "All right, what are the commands that are gonna come in? What's the agenda that we're looking to accomplish? What are the outcomes that they're looking to achieve from this?" And, we would plan about it, weeks and months in advance, leading up to that. People across all specialties, played a support role in that. And I think a number of them, as they got to some of the more senior levels in the Marine Corps, came to realize, and make the connection that, this is project management. The key is the aha moment.

**0:10:12 KL:** Yeah, when did that happen for you?

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**0:10:13 AW:** Yeah, yeah. So for me, the aha moment was probably when I was stationed here in Marine Barracks, Washington, because I was actually having to use the tools and the techniques that were all branded and labeled as project management. And when I got out of the Marine Corps, I realized that I branded that as part of what differentiated me: Leadership, project management. And they were recurring themes in my experience that have helped carry me forward all the way to this point in my career.

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**0:10:42 KL:** How far out did you start thinking about a job like that?

**0:10:44 AW:** For me, mine happened when I was actually at my last tour of duty, when I was working with others who were doing project management, called it project management, and I all of a sudden realized that I'm a project manager.

**0:10:54 KL:** So, when you went into that transition phase, that's when you did your branding of yourself with the tools and terminology of project management?

**0:11:00 AW:** Correct.

**0:11:01 KL:** What did you actually start doing?

**0:11:02 AW:** What I started doing, is of course, reaching out to my network. Not only within the military, but people that I had befriended that were no longer in the military, who had gone through this transition before, to help in giving me feedback with resume translation. So, that's a huge one. Understanding how the terminology translates to the profession. Because, you've got the experience, so once you have your aha moment, it's a matter of translating that experience in terms that an employer can understand who doesn't have military experience. Because the common theme there is, most people respect the heck out of veterans, but they don't really know what they are, or what to do with them.

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**0:11:43 AW:** Other than that, it was what additional supplemental training do I need to be pursuing?

**0:11:47 KL:** Oh, there you go.

**0:11:48 AW:** And so, there's certain things that you may naturally be doing, where they're training you certain skills, some of which could be construed as project management, to help prepare you for promotion to the next level. So, being able to identify those and call those out as well as understanding things like PMP. Is that something that I should be pursuing and making that known and active as you market yourself?

**0:12:13 AW:** I think a lot of what military serviceman which are being trained across all the branches is actually common to some core and to the degree that we can kind of connect the dots between what they're learning and how that is and/or very closely related to project management. It will help them a lot in recognizing that and having that aha moment early, as well as branding them when they eventually get to a point of transition.

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**0:12:44 KL:** Now, you talked supplemental learning, you talked about planning resume.

**0:12:46 AW:** Yes.

**0:12:47 KL:** What else would you suggest people plan into?

**0:12:49 AW:** Well, I think the other thing is starting through their network, understand what are the different ways with which they could apply their project management skills. Consider where you might prefer to go and what that means in terms of positioning yourself even geographically. And then also, at the same token, thinking about, "Okay, IT project management. Clearly that could be a natural thread for me, I am essentially doing that within the Marine Corps, do I wanna continue to do that in support of federal contractors, the federal government directly, consulting?" So, these were different things that I thought about, maybe not as soon as I should've but things that people absolutely can start to leverage their network to educate themselves on and position themselves so that when they get out, they don't feel lost, they feel prepared. And you're really at a position of strength instead of weakness. I think a lot of people that transition out of the military unnecessarily so put themselves at a position of weakness.

**0:13:49 KL:** Really?

**0:13:49 AW:** Because they haven't taken the time to think about this and really understand how marketable they really are and put a plan together to help in their transition.

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**0:14:03 KL:** So, this is an interesting topic. Now, if we move to your role as the Chief Operating Officer for 2016 for Project Management Institute, Washington DC. What can you see from this perspective about the role, either the chapter or PMI can play in that?

**0:14:20 AW:** I think a large part of it is the chapters have a really unique opportunity to help the active duty military members to have that aha moment, to realize that they actually have that experience and help them early on with identifying that and translating those skills so they're better positioned. Not waiting until your 60 days of terminal leave to figure out, "Uh on, my time's up, now what? What am I gonna do?" It's really something that doesn't have to be done under a short timeframe, under duress. You are doing project management throughout your military career, especially the higher up you go.

**0:15:00 AW:** And to the degree that the chapters do grassroots efforts can make connection through local bases to get in there and to identify what those skills are that people are leveraging, and then helping them through things like mentoring, pairing people that walked down that path. There's whole lot of veterans, myself included, that get really passionate about helping others. I've been down the path, I know what the challenges I encountered and I would love to do nothing more than to help other people have a smoother path.

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**0:15:33 KL:** Is that something that we need to talk to board members about, the drive?

**0:15:37 AW:** We are talking to board members and we need to be talking to our membership base more. Frankly, this is something that can take off very quickly and there's so many different ways that you can take a military liaison-type role. I think the near term win and focus for us will be on helping through grassroots efforts to help them with those aha moments, help them with the translations, help them with mentoring eventually. But really that can grow more robustly into guiding them, more specifically, into what the various path the project management are, getting them trained and certified within PMP or whatever their path is that they choose to take. There's really a whole lot that can be done with it. And there are things that we're doing already organically that tie right into this. So, our local communities area, and many chapters and PMI have local community efforts.

**0:16:25 AW:** We have an interest right now to stand up a local community in Fort Belvoir, there's demand and interest in doing that. You could see the potential synergies there of standing up that community and having that tie right in the military liaison effort, what we're also saying, "Hey, we're talking to you about things project management. Did you realize that this is what you're doing and relevant to you and something that you could do and continue to do as a career as you transition of out the military?" To the degree that you can help them, there's just this level of camaraderie and trust that makes those resources extremely attractive to a lot of employers.

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**0:17:04 KL:** What should transitioning military, becoming veterans and entering project management, what are some of the things they need to watch out for or there are some downsides of that?

**0:17:15 AW:** I think the big thing there is just the soft skills. It's things that aren't necessarily specific to project management but it's how you carry yourself, how you present yourself. You could get all the translation down in the world and show that you've got all this wonderful, relevant project management experience. If it comes to the interview or it comes to the interaction, you're looked at as a military robot who can't speak any kind of transferable language that other people can relate in corporate America, you're dead.

**0:17:45 KL:** So, in the end, what is your advice to those looking to start transitioning and how they should consider it?

**0:17:53 AW:** For the veterans or active duty members that are actually listening to this, I hope this serves as a message to have the aha moment. If you haven't had it already, to realize that you very much do have project management experience, and to begin to build and tap your network to understand that, translate that, and put together a game plan on how you're going to position yourself when you finally do transition because whether you serve four years or 30 years, we will all transition at some point and the vast majority will transition to some other follow-on career. So, it isn't to early to start, realize that now and half the battle is having that aha moment.

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**0:18:42 KL:** After a distinguished army career as a tanker, information technologist, and logistician, Jay Hicks developed and managed multiple programs for defense technology manufacturers at the US Central Command and the US Special Operations Command. It was at CENTCOM and SOCOM that Jay met Sandy Cobb, a consultant providing expertise in project, program, portfolio and strategy management. Sandy encouraged Jay to look into project management and the rest is history. I sat down to talk with him about a series of books that they have written for transitioning military personnel.

**0:19:16 JH:** We're all about serving those that have served. When I got out it was recommended to me that I look into project management because I might be a good fit for that. And it wasn't long thereafter I met Sandy and learned how to go about getting certified.

**0:19:31 Sandy Cobb:** Jay and I met eight or nine years ago, I guess, as military contractors. I had the standards that the PMBOK and PMI offer whereas Jay provided me insight and guidance on how to adapt and understand the military environment so we naturally conversed on a regular basis to say how do these two environments, how do they interlace?

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**0:20:02 JH:** Graduating from college is not dissimilar than what I would call graduating from the service. Those guys coming out of the service is like "Brave New World", just like that first day you came out of college. Very difficult transition for myself, coming out as a contractor, lot of unknowns in a lot of unexpected situations I was thrown into. TAP at the time was teaching you which kinda suit you needed to buy...

**0:20:26 KL:** TAP? The Transitional Assistance Program?

**0:20:28 JH:** Yes, exactly. We had a local TAP class and it was good, but it didn't give me the rudimentary things I needed getting out of service. So after 10 years of trials and errors, and meeting Sandy who knew so much about project management and helping me get my PMP certification, we decided collectively it was time to pay back and give something to the service members that were getting out and help them understand those little nuances that they weren't going to get from the Transition Assistance Program. And we put this together in a collective work to give them a lot of little details that hopefully will help them as they do their transition.

**0:21:08 SC:** What we were trying to do is to say, "Hey guys, you really have great project experience, you just need to understand how to translate that through different vernacular, so commercial hiring managers see the value proposition that you are providing."

**0:21:27 KL:** So the collective work is kind of your collected knowledge about what all they need to transition to and specifically to project management, as I understand it, right? Is the first approach you're taking?

**0:21:36 SC:** Well, right. So that was our first book because that's...

**0:21:39 KL:** What is it called?

**0:21:40 SC:** The Transitioning Military Project Manager.



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**0:21:47 SC:** The reason behind our series was that we see projects being done by the military all the time, in fact, it's a quote by Mark Langley.

**0:21:57 KL:** Mark Langley? That's the CEO of PMI at the time of this recording.

**0:22:01 SC:** "It's a mission but it's project management just under a different name," and I'm being a little free-licensed with his quote. That really resonates with a lot of military because they're unaware of all the missions and exercises and deployments that translate extremely well into projects. It's just a matter of how to help them identify those projects and translate those either to a PMP certification application, or to organize them in such a way to make them attractive to a HR hiring manager in the industry that they're interested in pursuing.

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**0:22:53 JH:** It was three tenets of the book really, and one of them is giving you some things that you need to know when you go out there to become a civilian finally. Just the little things I wish I had known. The second piece is a direct mapping of your military skill sets into the commercial field so that you can see how those things you've done in the service will be valued in the commercial industry. The last piece is that of which you take assessments during the book to find out how prepared you are for your transition. Those things that you're well prepared on, we recommend you get 'em on your resume and you highlight those, and those things that you're not well prepared in yet, go on to, what we call a "personal strategic road map" to help you during your transition.

**0:23:41 SC:** We did the three tenets, but we also spoke to a series of assessments, and we have five that are organized in a star format.

**0:23:51 JH:** Very military icon.

**0:23:57 SC:** One of the first assessments that we go through when we ask through a series of simple questions, what are their personal competencies and interests? Another one is the environment, so that they can understand where they wanna be and what do they wanna do.

**0:24:12 KL:** So that means very specifically the geographical environment? Saying you're...

**0:24:15 SC:** It's a combination of things like that, yes. Health...

**0:24:17 JH:** Where are you in relationship to the VA Hospital?

**0:24:20 SC:** Right. If...

**0:24:20 JH:** Where are you in relationship to your family as you're getting out?

**0:24:23 SC:** Right.

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**0:24:23 JH:** Do your kids need to go to university somewhere? Then you wanna be near them?

**0:24:26 KL:** Oh, the classic selecting a neighborhood and why.

**0:24:28 JH:** Yeah.

**0:24:29 SC:** Right. Exactly.

**0:24:29 KL:** Where you will work, where your spouse will work, where you have access to things that you're gonna need like the VA Hospital, and universities and things.

**0:24:34 JH:** Exactly.

**0:24:35 SC:** Right.

**0:24:36 JH:** But more interestingly too perhaps, is the fact that, as they go through these environmental assessments, they get to look inward and say, "Okay, these things are important to me."

**0:24:46 KL:** "They matter to me."

**0:24:47 JH:** "And I need to make sure I keep them in mind in my transition." Because, they're not necessarily gonna get that.

**0:24:53 SC:** And again some of these assessments offer the opportunity for them to speak to their spouses. Again, this is more of a simplistic, "Well, of course I'm going to do that," but it will ask the hard questions to bring up these types of considerations and dialogue. And that's the most important thing is that they're not doing it by themselves.

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**0:25:21 JH:** We think this book is probably best served if somebody acquires it one to two years prior to transition.

**0:25:28 SC:** Sometimes they don't have that luxury. So from a risk management standpoint, we have to look at, how much time do they have to make this decision and how is that risk mediated? And what they have to do and get prepared for to find that job?

**0:25:43 KL:** It's a little bit like critical path analysis almost, right?

**0:25:45 SC:** Yes.

**0:25:45 KL:** You have a date when you exit. You work backwards from there, right?

**0:25:49 SC:** [chuckle] That's right.

**0:25:50 KL:** Skip this next assessment, you don't have time.

**0:25:52 SC:** Right. Exactly, exactly. Right.

**0:25:54 KL:** Sort of. Okay. But, you're highlighting to them, "There is a clock, as you know. And it's a real clock, so start thinking."

**0:25:57 SC:** Yes. Right, right.

**0:26:01 JH:** But, as she said, not everybody gets that luxury. Some guys are forced out very rapidly and they probably need assistance as badly as anybody else, maybe more so.

**0:26:11 SC:** Right, and more so.

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**0:26:18 SC:** The other assessment is on the marketplace. We've segmented the marketplace into three areas: Whether they're gonna be a contractor, working through the DOD; whether they're in a civil service perspective; or, if they're actually going to go work for a commercial entity in the utility field, healthcare field, IT field. And what are the personality traits and other things that are associated with that?

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**0:26:51 KL:** So moving us past then the marketplace, what's the fifth note of your...

**0:26:55 SC:** The most important I guess is the skills.

**0:26:57 KL:** Yes. That takes us back up to your marketability of your skills.

**0:27:01 SC:** That's correct.

**0:27:02 KL:** How do you address the skills on the skills assessment there?

**0:27:05 SC:** Skills is based upon if you have a professional skill that you've worked through the military. And those things are MOSs, or skill identifiers. Logistician, or if there's intel skill identifiers, if there's engineering skill identifiers. They might be heavily experienced in a certain set of skills, but what's more important is, is what they desire to do as they're coming out of the service. So we ask them through the fifth assessment to look at those, to prioritize those and to think about what they wanna focus on as far as a career path. And then we offer them guidance on how that translates to career field and career occupations in the commercial world.

**0:27:50 KL:** And I think that's the beauty of this part of the book, this assessments aspect, is you're kind of, "We can talk to you that it's different. We can tell you how it's gonna be. But, now we need to help give you a structure for walking yourself through that," it sounds like.

**0:28:02 JH:** And I think that's a really good...

**0:28:04 KL:** That's really clever. [chuckle] It's helpful, I think.

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**0:28:11 SC:** In the military, they are given advice and almost a established career path of where they need to go. They complete that job and they go on to the next, and it's great stuff. But they are set up for success and that's what you need to do to complete the missions. In the commercial world you are looking to promote yourself versus, "I am a team member, I've gotten the job done, I'm going to my next mission."

**0:28:41 JH:** Military's all about teamwork and trying to get the job done as a team. "Oh, it's no man left behind. It's the buddy system, we're gonna take care of each other. And if you're not pulling your weight, by God, we're gonna make you pull your weight."

**0:28:53 SC:** And that's what's so nice about the innate characteristics as these guys transition, especially into the project manager field. Because they have these leadership capabilities where there is no person left behind. And they just want the team to win. So they're gonna skyrocket just because of their military experience. I truly believe that.

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**0:29:21 KL:** Can we name some of the characteristics that you see many of the folks coming out, that are very likely to be very valuable in the project management space?

**0:29:31 SC:** Again, leadership, diversity, the ability to adjust, depending on a moment's notice.

**0:29:40 KL:** So high levels of adaptability being in project management.

**0:29:42 SC:** Right, adaptability.

**0:29:43 JH:** Performance under pressure. So many people over the last 20 years have been in direct combat. And we're not just talking about infantry and armor folks. We're talking about transporters and all kinds of service members. That kind of pressure cannot be simulated in the commercial world. So some of them will be able to transition easily and not succumb to pressure 'cause they'll relate to, "Well, this is nothing compared to that day I had in Iraq."

**0:30:15 SC:** The kin sense that they have going from mission to mission and the ability to lay out a project plan with its interdependencies, its milestones and its angle with a date in mind, is just phenomenal. They do that on a regular basis.

**0:30:33 KL:** And that's the project management world, isn't it?

**0:30:35 SC:** And it is. That's right. And they know how to use not only their team and get the team to go forward together, but to use their informal network. They're very good at that as well.

**0:30:46 JH:** But the guys and gals in the service have a challenging time translating their skill sets to commercial skill sets. So, that's one of the other items that we try to incorporate in this book is to give a lexicon and it's to be able to help them understand how to do some of this translation, how to put together a PMP application, using the correct PMI vernacular.

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**0:31:15 KL:** Why do I wanna look for these guys when I'm a project manager or hiring project managers?

**0:31:19 SC:** They have innate leadership capabilities that is harder to learn than becoming an expert in JavaScript or something like that, and I'm not taking away any technical skill sets but you can learn those, I think, better and more quickly than you can leadership.

**0:31:40 JH:** The project manager is where the rubber meets the road in the commercial industry, and they are executing management's desires by getting the assets of the organization to crank it out. And you need a leader, in most cases, to be able to make that happen effectively and once again, we think the military mindset's perfect for that.

[music]

**0:32:03 SC:** Stakeholder management is another key asset that they can bring to the table because whatever their mission is, they have to be able to perform on the mission and get the team to completion. And the neat thing is, is that, yes, they have a hierarchy or a chain of command that they have to deliver items to but in order to do it, they seek out those people who will help out and not leave a buddy behind to get the job done. Because they're dealing a lot, especially at tactical edge, with the war fighter. They're wanting to make sure that they can come home at the end of the mission. And so, there's lives at stake and so that increases a perspective and an appreciation for what they need to do and prioritize.

[music]

**0:32:58 JH:** We all talk about multi-tasking and all that but the sergeant has got to be able to handle 12 missions in one day. He's gotta be able to put those missions out, what needs to be accomplished, disseminate that to his subordinates and say, "Make this happen," and do it in a fire-and-forget mode. Do it and know that it's gonna happen. And that's the daily life and it's a challenging environment in garrison and, as you can imagine, in combat. It's absolutely chaotic, and these guys just gotta remain calm and cool. But all the more reason, we think that project management is so fitting for so many military members as they transition out because they understand the pressures associated with getting the job done and getting it done right the first time.

[music]

**0:33:52 KL:** What are you observing when it's not working, where it's not connecting? Do you have anecdotal or other information about, "Ah, the guy had the right skills but somehow, it's not translating."

**0:34:02 JH:** The military is very action-oriented. They want things done. They want it done now. And that poses a problem for a lot of young project managers because they get into project management from the service, and we have a deliberate process to do something if we try to use a lot of the tenets of the PMBOK, and there are those that don't see there's a tremendous amount of value in all of that, meaning closure is value to a lot of folk and the planning, they're not sure exactly how that brings value. So, we've run into some of those issues over the years as well.

**0:34:35 SC:** From my view, as a DOD contractor, these guys are so ingrained with these characteristics and these skills that they have their own vernacular like speaking a foreign language to somebody. They can just chat. I would be in meetings for the first six months, raising my hand going, "What did you just say?" and it was a project management meeting but I didn't understand what they were saying.

**0:34:58 JH:** So, the first thing we need to keep in mind is that, growing up in a family is not dissimilar to growing up in the military. They completely break you down and rebuild you into what they want as a military man or woman. During initial training, they teach you how to think, they teach you how to walk, they teach you how to run. They teach you everything even though you think you already know how to do it. You're not gonna do it at the military. Then, it's ingrained along with the characteristics and the core values from the military as well which the good news is, they have great core values.

**0:35:32 JH:** The challenging news is once it's all ingrained into you, it's really hard to take the soldier out of the man or the woman or the sailor out of the man and woman and that's what really needs to happen to some degree. They need to be able to get out in the civilian world and interact with civilians. They need to become part of the civilian team. Well, in the back recesses of their mind, the recording continues to play about, "How am I supposed to behave, how am I supposed to act," and they often appear different from their civilian counterparts.

[music]

**0:36:12 KL:** So, you sure make a noise in PMI land. I ran across the two of you at the Leadership Institute meeting in Phoenix in 2014. Is there some action that you would like chapters to take?

**0:36:23 JH:** We actually have a methodology and we're trying to transport that methodology to other chapters as they adopt the position of either military outreach, military liaison. We don't really care about the title.

**0:36:32 KL:** So, they need to formalize some sort of position so that there's somebody that's a lightning rod. And what kinds of activities would you have them do?

**0:36:37 JH:** We generally, we try to do an announcement at the local base and get folks to come in to a meeting of some type on base, where we actually do a little bit of instruction on what PMI is, what a PMP is and what the CAPM is because people want to know. It's amazing. We'll do an announcement and we'll have 20 or 30 people show up. They hear about it but they don't know what it is. They know there's goodness in it, they know that it could help them in their post-military career. And so, one of the things we've tried to do is just get 'em in and let 'em know what it's about.

**0:37:12 KL:** But it goes beyond that.

**0:37:13 JH:** Yes, it does.

**0:37:14 SC:** It does.

**0:37:14 JH:** We invite them then to come out for a pre-meeting at the local chapter, where we try to

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bring in military folk and new members, and talk to them about more detail, about what PMI is all about and the goodness in it and why it can help them in their transition and trying to get a commercial job at a later date. Hopefully, at that point, some of those folks will stick around for the chapter meeting and some of those folks will actually join the chapter and pursue getting the PMP or the CAPM.

**0:37:43 SC:** Each chapter, believe it or not, all have a different little twist on it. So, why we've come up with some ideas on mentoring, we've done scholarships, we've done discounts for symposiums, we've done a whole series of different things that have worked for the Tampa Bay chapter. We are now, through the last year, finding out all these other great things that other chapters are doing that fit the model of their chapter. And these are all good things that if we've created a cookbook, so to speak, and we've put those out there to share.

[music]

**0:38:27 KL:** One of the things I'm gonna be looking for, in some future, with you guys is some evidence that it's working. It would be really good to see the outcome some time after these books, after the chapters are involved. This is a year or two out, but how is it working as more and more people come out of theater? We could continue our draw downs and as we make budgetary shifts in the military as well, this is a very important aspect. I thank both of you for your efforts.

[music]

**0:38:52 KL:** To get a copy of the cookbook that Sandy talked about, go to the Tampa Bay PMI website or try googling Tampa Bay PMI Military Outreach. The Transitioning Military series of books by Jay Hicks and Sandy Cobb is available at amazon.com as well as on gr8transitions4u.com. That's G-R-8-transitions-4-U.com. As well as at the PMI bookstore.

[music]

**0:39:31 KL:** After serving five years in the Army, including two tours in Iraq, Matt Morey went to work for National Oilwell Varco out of Houston. Years later, he started his own company, C4 Explosive Leadership Training to help entrepreneurs and leaders develop their project management skill sets and leadership skill sets. I heard about the great work Matt was doing with PMI Houston to help veterans. I wanted to know more.

**0:39:55 MM:** I was a tank platoon leader in Iraq in 2003. So, when the Saddam Hussein statue came crashing down, the same day that happened was the day I crossed the border from Kuwait into Iraq. While in Iraq, less than a month, I took over an armor platoon which is four tanks and 16 guys from somebody else that wasn't getting the job done. Did that for a year. Somebody looked at my college transcripts and realized I had a computer background. Moved me over to what they call Signal Corps, which is communications technology. We were the first division to deploy with the, it's called joint network node, but basically it's a TCP/IP-based network protocol that's designed for the field.

[music]

**0:40:37 MM:** I got the unfortunate title of Special Projects Officer which basically meant that any

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time the two-star general had a bright idea and nobody else wanted to do it, it became my problem. That culminated in my being the Officer in Charge, OIC for a 65,000-person event. I left as a Captain, and to be perfectly honest, I didn't know Project Management was even a career. I was running Information Technology projects for the Army.

**0:41:05 KL:** And didn't know you were a Project Manager?

**0:41:06 MM:** And didn't know I was a Project Manager. I thought I was a Network Manager, a Network Administrator, or something along those lines.

**0:41:09 KL:** Oh. Okay. More operational. Yeah.

**0:41:11 MM:** Much more operational, but because the operations were literally pick up, design, drop in place, stay there for a few months, and then move again, it really is project-based because it's not like you're maintaining the exact same network month-to-month.

**0:41:26 KL:** But you discovered that at hindsight I think.

**0:41:27 MM:** Yeah, exactly.

**0:41:27 KL:** Yeah. Okay, okay.

**0:41:28 MM:** That was definitely defined in hindsight.

[music]

**0:41:37 KL:** What was it like to be getting ready to exit from combat and special projects? What were you faced with? What did your future look like even?

**0:41:44 MM:** My future was a big question mark. I think that's probably the best way of describing it. The Transition Assistance Programs that are provided by the military are largely designed just to get people to know interview skills and resumes. At the time my wife was pregnant with my first kid, I didn't know what I was going to do or where I was going to go. And I knew that I didn't necessarily wanna be a Network Administrator anymore. And my degree actually, I mentioned a computer degree but my degree was also... I had a Sales and Marketing degree, I double-majored. So I was thinking a sales role would be where I would end up.

[music]

**0:42:18 MM:** I interviewed with a company named National Oilwell Varco which for some of the listeners they may not know. It was a Fortune 200 company at the time. It's probably a Fortune 500 company now with what's going on with oil prices and everything but a Fortune 200 company that specialized in the design and manufacturing of oil-fueled equipment. I was interviewing for a sales job. They asked me to come to Houston and and interview with more of their people. So they liked what they saw and wanted a follow up and...

**0:42:44 KL:** But you didn't plan any of this?



**0:42:45 MM:** I didn't plan any of this.

**0:42:46 KL:** It's happening to you.

**0:42:46 MM:** This is happening. So I arrive for my interview at their headquarters and I walk in the door, I get introduced to the Regional Marketing Director, I shake his hand, he takes one look at my resume, we spend maybe five minutes talking and he says, "You're talking to the wrong guy, I'll be right back." And they escort me to this giant corner office. It's a Vice President of Project Management. So two and a half hours later I finished the interview with him and he offers me an Assistant Project Management job and then asks me if I have any questions. What I asked was, "Sir, I'm not an engineer and I know jack about oil and gas. Why would you be interested in me as a project manager?" And what he told me was, "Matt, I have engineers to do the engineering. You can learn the oil and gas. I need somebody that can get from A to Z and make sure B through Y are taken care of along the way."

[music]

**0:43:41 KL:** Reflecting backward now on it, what in your six years of your military service applied directly and then maybe even indirectly to project management? How could you summarize that for us?

**0:43:51 MM:** Well, I would say right off the bat the leadership and communication skills that a military person learns are immediately applicable.

**0:44:00 KL:** I hear those labels a lot. Can you tell me more about that? What is it about leadership or the nature of leadership that you see is applicable between the two and communication?

**0:44:06 MM:** A lot of the time in project management the person that becomes the project manager tends to be the most technically smart person in the room.

**0:44:15 KL:** Okay.

**0:44:15 MM:** Unfortunately, technically smart doesn't necessarily mean people-smart, communication-smart, mission-smart to use a military term. Mission-smart is the ability to analyze and see where we currently are versus where we need to be and the steps necessary to get there to complete the mission.

**0:44:31 KL:** Specific to the mission. Yeah.

**0:44:31 MM:** Specific to the mission. Now. They don't need to know how every single step gets done, they just need to know that every step gets done.

**0:44:37 KL:** Right.

**0:44:37 MM:** And that's where you run into a difference between leadership versus specialty, because a lot of the time, especially when you start looking at a lot of these larger projects, there's no way that a project manager can know every detail of every angle.

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**0:44:51 KL:** So your statement then that the mission-smart is what translates to a project manager?

**0:44:55 MM:** I think from a military stand point that mission-smart has an incredible ability to translate.

**0:45:00 KL:** You're taught to think that way. And so that comes from a leadership concept in your mind?

**0:45:03 MM:** Yes.

**0:45:04 KL:** It's not about communication?

**0:45:06 MM:** A lot of the time, and this may be an Army or a Marine thing, but a lot of time missions either live or die in the military by your ability to communicate, your ability to let them what needs to be done when; especially some of us that have been through combat a couple of times. Our ability to communicate and navigate the immediate stress and chaos that's associated with combat is how our platoons or our units survive.

[music]

**0:45:36 KL:** So you've talked about two key things there around both the ability to have leadership and to do thoughtful communication in difficult times. Now that would be applicable to many professions. What is it about project management that calls on this? Where are you seeing the connection so strongly?

**0:45:48 MM:** The biggest connection is that the military veterans don't realize that they're doing project management every day.

**0:45:55 KL:** Oh. What elements are you seeing that show that?

**0:45:58 MM:** Well, and here's the exact element that I can relate this to. In the military we are given missions with specific tasks and end dates. That's project management. We're given, "Here's what you need to do, we need it by this date and we need it by this time with this many people." That's how you have to get it done in that window. Whether it's a combat environment or you're in garrison which is when you're back at your home base, you are given tasks and missions on a regular basis that need to be completed and that the leadership that's required of it is up to the individual managers, the individual leaders to figure it out. So when a colonel comes to a captain and says, "Your whole company needs to go on a training exercise for six weeks," they don't tell them the detailed plan. The colonel will tell them, "Here's where you need to be, here's what we expect you to accomplish. How are you going to do it?" And now it's the captain that turns into basically a project manager.

**0:46:48 KL:** So you think that meant here as an instance that it's a temporary endeavor that produces a final outcome on a date certain time?

**0:46:54 MM:** That's basically what the military does on a regular consistent basis.

**0:46:58 KL:** Seems to be that people don't talk about it that way in the military so people, as you

said, don't realize it.

**0:47:03 MM:** There's a lack of translation.

[music]

**0:47:10 MM:** These gentlemen and ladies that are coming out of the military could very easily find their way into project management if they knew it was an option. But for the most part they sit there and think sales or operations or a lot of the guys that are on the enlisted side are afraid they're gonna end up being a wrench turner or something along those lines because they don't know how to... Not just they don't know that project management doesn't exist but they don't know how to translate their skill sets, the language and the customs into something that makes sense for a civilian side.

**0:47:35 KL:** So essentially the military has already trained you.

**0:47:37 MM:** Military in a sense has trained but the difficulty actually is there is a little bit of cross training that need to happen, or cultural awareness that needs to happen because even if the military people were aware of this, the biggest thing that they would probably run into is the way they present themselves can be incredibly intimidating to a civilian market. And this is one of the hardest lessons that I've learned personally because I came out of the military and I tried to treat it like it was still a military job. I would give 'orders'. And I'm making quote marks with my fingers for the people that can't see.

[chuckle]

**0:48:10 MM:** So, I would give 'orders' to my staff and then I would run away and I wouldn't do any real interaction. I'd just say, "Hey, I need this done by Friday. Leave the paperwork by the desk," and go run on to my next target. And yes, I would use the word 'target' in that particular realm. And I had a, God bless her, a 55-year old woman that did everything I wanted her to on a timely basis but she came up to me, two months in, and said, "Matt, I can't work for you anymore." And I didn't understand because she was everything I'd want in an assistant. She was getting the work done, she was doing it timely. I didn't have to micromanage her. It was beautiful in my mind. But I never said 'please', I never said 'thank you', I never asked how her husband was doing. I never asked about the grand kids. All I did was swoop in, drop off work and dive out, and that's a military mindset.

[music]

**0:49:03 MM:** Here's the biggest problem for the military veterans that are coming out. Less than 1% of the US population has actually been in the military. Less than 5% of the US population has direct relationships with people in the military. In a manner of speaking, the military is a completely different culture, different language, different skill sets, different terminology, different everything. And they're coming out of that environment into a civilian world and it might as well be a different world.

**0:49:35 KL:** So, this opens the opportunity that we could from our profession, project management, reach out across this bridge. My understanding is that you've led a lot of the efforts at the Houston Project Management Institute?

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**0:49:46 MM:** Right. The Military Outreach Program was something that we were toying with probably about the same that Tampa was. The PMI Global came forward and said, "We'd love if people would start working on this PMI military outreach." And the board of directors for PMI Houston came to me because I've successfully made the transition and I've helped several veterans through smaller programs do the transition. I work one-on-one, resume building, interview skills, that kinda thing. And the reason I was doing that was more out of feel for wanting to help than actually looking for revenue. I didn't charge for that, I was just trying to give back.

**0:50:23 MM:** So, they asked me to put together a program for doing it larger scales, transitioning veterans from... The joke we were making is, "POG to PM." Now, in the military, POG is person on the ground and that generally is a... If you're in the Army or Marines, it's a disparaging term for somebody that doesn't know anything and doesn't do anything well. So, we intentionally called it 'POG to PM' as a manner of getting them understand, "You need to change your mindset." So, we're starting it right off the bat with the title.

**0:50:51 KL:** And then, they got clever.

**0:50:53 MM:** But what we did was we built a 5013C for an education foundation. That handles not just the military veterans transition but also scholarships for kids attending college with a project management emphasis and some other things. And we did that so that we could have a charitable organization that companies and other groups could donate to and make it a write-off for themselves.

[music]

**0:51:16 MM:** So, we put out a call to the Texas Workforce Commission.

**0:51:19 KL:** And then, they got even more clever.

**0:51:21 MM:** Which has a register through the Transition Assistance Programs at all the bases of who's coming to Texas and where in Texas are they going. So that we were actually reaching out to the people that were in Houston as opposed to people that might be stationed in Houston but getting ready to leave. What we ended up doing was we created a six-week program where we sponsored 15 veterans. We created a scholarship that paid for their initial PMI membership and their first PMP prep test. Four of the classes, four of the the six weeks were designed around a PMP prep course. The very first week was designed around a military transition course. So, just scratching the surface on the cultural issues and the communication issues that we've been talking about.

**0:52:08 KL:** You said the first week? That was on a weekend only?

**0:52:10 MM:** It was designed to be on weekends because some of these people actually have jobs. And a lot of the instructors that we were using were volunteers that had jobs. So, we designed it around a six-Saturday program. The first one is the transition course trying to get them to understand how to change their terminology, or at least that they have to change their terminology. Trying to get them to understand that their body language can be intimidating and their word choices can be intimidating. Different things that... It's an awareness factor.

**0:52:36 MM:** Somebody else in the program is their partner now. So, now they've got mutual

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support during that first day and that support is also supposed to be on the lookout to make sure that they're not falling back into old habits or that there's awareness associated with it and they're supposed to be study partners. The second week is all about resume writing and interview skills. And now, that particular session, we opened up to the entire chapter because the entire chapter was paying membership to be there. All veterans got to go for free.

**0:53:04 KL:** I'm also hearing a little bit about beginning to bring them in and starting the process of socializing them with the rest of your membership on weekends.

**0:53:10 MM:** And that's... Yes. That...

**0:53:11 KL:** This is a professional association which is yet another slice on civilian life.

**0:53:14 MM:** Exactly, exactly. So, the very next week we start the PMP prep course.

**0:53:19 KL:** Four eight-hour sessions, that's at 32 hours of training, or most of their 32...

**0:53:21 MM:** That's the... Most of the 32 hours and they should be ready to take the test.

[music]

**0:53:31 KL:** So, it sounds like a pretty well-designed thing now. So you took 15 people through this. This is what year?

**0:53:36 MM:** This past summer.

**0:53:37 KL:** 15, this year, 2015?

**0:53:38 MM:** 15 this year, this past summer. Out of the 15, we've got four that have taken the PMP tests since August which is when we finished the program. And they've passed. We've had two that didn't and we're working with them to re-study up. And the remaining nine and are all scheduled to take the test before the end of the year. One of the requirements before they could even start the program, when we built the program, was that you had to have enough hours, you had to meet the criteria to actually earn the PMP aside...

**0:54:04 KL:** Oh, the 2000 or whatever...

**0:54:05 MM:** Yeah. The number of man-hours, not the course work, but the...

**0:54:09 KL:** Experience?

**0:54:09 MM:** Experience level. And we had something like, the first time we put through, we had roughly 50 applicants that in a 10-day cycle had filled out the paperwork, provided the number of hours, provided the support, and we narrowed it down to 15.

**0:54:22 KL:** Yeah, I assume you're gonna look at this over time to see how they...

**0:54:25 MM:** Yes, in fact, some of the commitments that we have for them as part of the program is

that they'll also attend six PMI chapter meetings to try and make sure that they stay in the community. We've also included in the requirements the need to give back, so that they will be working with other PMI military transitions. So the idea being if we could build a sustainable community.

**0:54:48 MM:** One of the things that we did at the end of the training cycles was we brought them together for a celebratory dinner and put in with them the PMI Houston board. And so we all sat down for a nice dinner, and had a long conversation about what went well with the program, what could change, where was the benefits. Almost everybody was universally positive on the program, and they didn't want us to give it up. The most of the critique that we've got was actually that they would like a little bit more mentoring. One of the things that we are looking at is the funding for it. PMI Houston basically did the donation to the education foundation to do this. But the intention is, and this is why we did a 5013C, the intention is to reach out to corporations that claim to help veterans, and ask for their sponsorship associated with this as well.

**0:55:33 S5:** Well we believe that project management is actually in demand by these organizations, so for them it's actually a legitimate recruiting tool.

**0:55:40 MM:** And that was exactly the statement I'm gonna make, is there are corporations locally that are very interested in helping veterans. They need the project managers in their pipeline. So with that in mind, we can partner with them and hopefully create a ability that will save them on recruiting fees and a bunch of other things with giving them people that are [chuckle] literally tried by fire.

[music]

**0:56:09 KL:** Is there any chance that moving farther upstream in that to get people understanding the project management concepts earlier, or the need for this transition earlier?

**0:56:16 MM:** I actually had a conversation with Global about how there needs to be more outreach to the TAPS programs in general, and potentially into some of the commands in the military. And the reason I say that is because one, the military doesn't understand that what they're really doing is project management on a regular basis. So the processes and procedures and things that PMI has spent so much time developing could actually be considered a significant asset to the military, in general. It might even be considered a valid form of training for the military, especially for officers and senior enlisted people that find themselves in the project management role, even though they don't know that they're doing project management. That would be a significant market that PMI Global might be able to flex its muscles and get into.

**0:57:04 MM:** For the local chapters, I would encourage to, if you don't have a military base nearby, do what we've been doing, reach out to your workforce commissions, reach out to the groups that track unemployment. Because they're going to have an awareness of your community and who would benefit from the program. If you have a military base nearby, then I would say, follow the Tampa model. Try and coordinate some lunch-and-learns, try and coordinate some growth sessions and reach out directly to the local TAPS program, which is Transition Assistance Program, to grow the awareness through that factor.

[music]

**0:57:41 MM:** Invariably you will spend money on people that may not pass the test. But to be perfectly honest, you're gonna get more than what you paid for out of it anyway because you're going to end up with dedicated membership. The one thing the military is, is loyal. You don't put on a uniform because you're looking for the paycheck. So if somebody's willing to help you out and they get a sense of brotherhood, camaraderie, those types of things through PMI, then they're gonna stick around.

[music]

**0:58:11 KL:** To learn more about the outreach efforts of Houston PMI, visit the Houston PMI website. For information on Matt's company, C4 Explosive Leadership Training, go to [c4leader.com](http://c4leader.com).

[music]

**0:58:27 KL:** So the transition to civilian employment is itself a project. The challenge to the individual is to recognize that they have the skills needed to be PMs and to start planning your future. It is incumbent on us and in our interest as members of the profession, and even more as members of chapters, to recognize the needs and the skills of our military veterans. Our chapters can take the lead in institutionalizing our support of the transitioning military service members, enabling them to join the ranks of professional project management. We can help and we can grow our membership.

[music]

**0:59:01 KL:** Special thanks to today's guests Andy Waker, Jay Hicks, Sandy Cobb and Matt Morey. We really appreciate their insights, their service and their efforts.

[music]

**0:59:14 S5:** Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt and Lionel Isles. Post-production performed at Empowered Strategies, and technical and web support provided by Potomac Management Resources.

[music]

**0:59:31 KL:** PMPs who have listened through this complete podcast may submit a PDU claim, 1PDU, in the talent triangle Strategic and Business Management with the Project Management Institute's CCR system. Go to CCRS, select 'Education' and then select 'online or digital medium', and enter the provider code C046, the Washington, DC chapter, and the title PMPOV0026, Military Transition, Joining The Ranks of Project Management. Make sure to select 1PDU under the strategic category at the bottom of the webpage. If any of our listeners have comments about this episode or past episodes, or ideas for future guests or topics, please go to [pmiwdc.org/contact](http://pmiwdc.org/contact) and leave your comments there. Or you may contact me directly at [kendall.lott@pmiwdc.org](mailto:kendall.lott@pmiwdc.org). I'm your host, Kendall Lott, and until next time, keep it in scope and get it done.

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