29. Wood, Brownlee & Wynes: Influencers Part 1 – New Perspectives

[music]

0:00:04 Don Wynes: We don't make money doing projects, we make money finishing projects. So the very best project managers are the ones that get the projects finished.

0:00:14 Dana Brownlee: Just because they're not really sure what they want, doesn't mean they're not gonna hold you feet to the fire at the end of the project because you didn't deliver it.

0:00:22 Michael Wood: Management could care less about all your frameworks and that. The only reason they care about it is if it gets the job done.

0:00:31 Kendall Lott: This podcast is the first of a series of episodes we will have with influencers in project management. These are individuals who publish articles, blogs, videos, or run webinars on the PMI members portal, projectmanagement.com. You can find their influencer ratings there as well as read their blogs, white papers, articles, and engage with many online groups. The PM Point of View podcast can also be found at projectmanagement.com. We asked some of the top rated influencers to talk to us about what they thought were the most important ideas in our discipline.

0:01:03 KL: The influencers in this podcast look at project management through a wide angle lens, capturing a breadth of topics that impact our work. My three conversations here are with people of diverse backgrounds and focuses, but I found some common themes. For example, less emphasis on the importance of PMs in the PMBOK and more emphasis on the human element. Communication and revving up the team with a single purpose. Who you know is important and more important is how you are perceived; you wanna be that go-to guy or gal. The key is really getting the job done. All the most up-to-date methodology and best practices are worth nothing if you can't complete the job.

[music]

0:01:44 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.

0:01:56 KL: Michael Wood is a retired CPA and subject matter expert on IT strategy in business process improvement. During the 1980s, he headed the Helix Corporation where he developed the Helix Methodology. He has written on a variety of topics for projectmanagement.com, ranging from project management to organizational development to methods and frameworks, survey round ups, you name it. Even some PDU qualifying videos.

0:02:20 DW: From an influencer's perspective, what are some of the things that you have observed now in your many years of working as a project manager in business process improvement? What

are project managers getting wrong? What are we still not getting right? I mean we've got five PMBOKs to follow.

0:02:34 MW: Yeah, I know.

0:02:34 KL: You'd think we'd get it by now. Agile's come in and given us a whole new world.

0:02:38 MW: And I think that's part of the problem. When you're my age, you've seen it all come and go, everything's had it's, "This is gonna be the silver bullet, this is the final deal." And what it really comes down to for project managers is being able to get things done. In fact, I'm just pinning an article that'll be in next month on Front Page about hybrid project management, which is a misnomer because it's talking about Waterfall versus Agile versus Scrum, and can you blend them, and none of those are project management. Those are development frameworks.

0:03:12 KL: Those are development frameworks, exactly.

0:03:14 MW: But yet everybody gets it wrong. I'm gonna share a little secret with you having been on the leadership of a billion dollar plus company committee as a CIO, that management could care less about all your frameworks and that. The only reason they care about it is if it gets the job done. And, in fact, when you're sitting around the table talking about that mission-critical IT project, the only conversation they have beyond, "Can we afford it?" and what payback is, "Who do we get to do it?"

[music]

0:03:49 MW: Who's gonna carry this home for us? What individual, leader, project manager guy, can we rely on and count on to get this thing done? If that person has a track record with them, they'll let him do whatever he wants.

0:04:03 KL: Well, what constitutes a track record here? So what are they looking for when they see that?

0:04:06 MW: Well, they're looking for a person that communicate clearly with them and not use jargon and not be wrapped up in a method or a process to the point where that means more to that person than actually getting the goal done. I can't tell you how many times, and in fact, I just got through a $60 million fiasco project I was looking at that they were trying to scrape off the ground, and the conversations always went to this, "Is that Agile? Was that LEAN?" I said, "What about will that work? [chuckle] Will that revive this corpse?" And I went, "You guys are asking all the wrong questions 'cause you're more married to the process, than you're married to the outcome." Getting people to focus on the business and not on their toys, and that's how management sees a lot of these things.

[music]

0:04:57 MW: A project manager doesn't care how the tasks break out once they break them out, they're gonna manage it to the tasks. And so they need to understand what Agile is and what those things are. They don't have to be expert in it. They also need to know when the want to cut it off and say, "Don't do that, that's not effective, you're just following it because you're supposed to follow

it." And they have to have that judgement. I think the one thing that separates executives that make multi six-figure salaries and those that don't, is judgement. Your ability to look at something clearly and go, "What do I have here? What are the components of it and how do I affect change to it?" or "How do I keep it alive?"

[music]

0:05:42 MW: You get no credit for your technical skill set once you have the job. That got you the job. Now it's how you can navigate the organization, how you get along with people, how do you keep people up to speed, how do you motivate, how do you lead, how do you mentor? That's what we're... The people that rise the top, rise quickly.

0:06:03 KL: Do you see as a substantial percentage, that we have people who have the technical skill and then fail to navigate the organization? Is that endemic?

0:06:12 MW: I think it's almost pandemic. [chuckle] Because...

0:06:14 KL: Okay. Was it a function of our training?

0:06:17 MW: Yes. Here's what happens. You're led to believe through all this hard work that that's what really matters. So therefore, the world should appreciate that's what really matters.

[music]

0:06:32 KL: Is there another thing that's missing that helps people navigate well to be able to work the organizational environment they're in?

0:06:39 MW: Yeah. I think there's... One of the things that I really harp on and I maintain it's worth at least 50% percent of your success, is the ability for people to think well of you. If I don't think well of you, I'm not gonna listen to a word you say. I'm just gonna go, "Why are your lips moving? I don't like you."

0:07:03 KL: We don't have a word for this.

0:07:05 MW: No. They always say it's not what you know, it's who you know. I always say, "It's not what you know, it's who you know that can make a difference." Who you know that has the influence. Who you know you wanna attach your star to or learn from, or emulate, that will think kindly of you. Because you could be the most competent project manager or any other technical field in the world, but if people don't think well of you, they don't like you, they won't give you a break.

0:07:32 KL: That's interesting. So it's not who you know, or even what you know, it's how you're known.

0:07:37 MW: Right. And by the right people.

0:07:38 KL: Right. By the right people. So, how do we protect that then?

0:07:43 MW: It would be great if in the project manager realm, they would do some training on active listening skills, facilitation skills, collaboration techniques and skills. Collaboration, everybody talks about it but few do it. Usually it's alternating monologues. Exchanging ideas and building something is a lot different than just talking at each other and thinking you're collaborating. It's an immersive process. And if you've ever done a real collaboration that produce something, it's hard to explain, but you know you done it. [chuckle] We just did something amazing.

[music]

0:08:29 MW: One other thing that I think is really critical is the ability to fly at 40,000 feet and then dive down to 10,000 feet below sea level in essence in terms of detail without getting the bends. And be able to bounce back and forth between high level concepts and a detailed doing, pretty much seamlessly. So being able to move it across those plains allows you to relate to the technical people. The people that got the blinders on and have to respect you to work for you from a technical standpoint. And also, deal with the high level conceptual people in the board room, or the executive branches and stuff. Or the artist people, so they can say, "Okay, you get the big picture."

0:09:10 KL: Now, take me to the tactical. When you referred to 10,000 feet below sea level without getting the bends, what you mean there is?

0:09:18 MW: Well, you're down in the trenches. I am working down at the data structural level and process logical level in programming, doing design specifications. That's pretty deep, short of coding. And at the same time, I'm able to, in my conceptual model, link it right back to why we're doing that all the time. It's a constant alignment exercise.

0:09:42 KL: This doesn't sound like how they described. There's nothing wrong with project managers, but this is not how I hear them describing project management usually. This sounds like a consultant. This sounds like an executive or perhaps even a program, or program manager perhaps. But when I look at the PMBOK, they pick up communicate. They pick up obviously the whole thing. It's around a technical skill, but there's not a focus of it within the guidance or structures or trainings I think you would normally get. Or, perhaps I'm wrong.

0:10:08 MW: No, I think you're dead on. Think about it, most guys when they think about their communication plan, think about the dashboard they're gonna do. And they're gonna put it up online and people can see it, and all this stuff. And it's still a one size fits all.

0:10:22 KL: What should the comms plan look like for a PM who's taking over?

0:10:24 MW: Comms plan should look at every key steakholder and personalize it. If it's a group, you're gonna have to generalize more, but if it's individuals, which are the ones you really have to please and understand how they like to be communicated to. Does this person like you to drop by their office on a Saturday afternoon and give them the wear with all and leave the paper behind? Do they want us to have a dashboard on their desk? Do they want an email? How do they wanna be talked to? How do they wanna... How much time are they willing to have you talk to them about what's going on? Are they a person that likes the story or do they want you to get to the punch line?

[music]

0:11:01 KL: Who's teaching this? If we all know about it, then there should be some sort of tool or body of knowledge around this as well.

0:11:06 MW: I feel that I do my small little part because I write to this a lot. And I keep pushing this message out for the last 16 years. And 150,000 people a month get my IT Strategist newsletter, which has a lot of that stuff in it. This is truly what a project manager should be doing is saying, "Who's my audience? How am I gonna talk to these guys to get the most mileage from them and be most respective of their time?"

[music]

0:11:38 MW: There's a case being made in universities to start adding this to the curriculums. To start talking about putting project management to action instead of all building around how to build a project plan, how to do this, how to do the technical side. Which isn't really rocket science. You need to know it and you need to have the... And the PMBOK's greatest, what I call the master check list that I do everything I need to be doing, have I left anything out. But when you're actually a practitioner, the guys that really make it are the guys that have figured it out, how to navigate the organization and get people engaged to support a project.

0:12:18 MW: How many guys do you know in the PM world that know how to really listen like a doctor would listen to you, and not try to tell you how you should do something but sit there and really find out what is it that you really wanna do? And how is this gonna impact your life? 'Cause you go down into the trenches and say the company's gonna make a change in the XYZ system, people get worried. Does that mean I'm gonna be here, I'm not gonna be here? If you want them to buy in emotionally they have to be able to see how they attach to the new way, the new place in the future.

0:12:51 KL: It is pretty old school change management in what you're saying here.

0:12:53 MW: Absolutely. They're a change management function. And every project I know of at least in the IT world, brings with it some kind of change. It's not gonna be like it was, otherwise we wouldn't need the project. It's the first question I ask of most CEO's when they give me this big, long lineage of what they're trying to accomplish, I say, "Why can't you do it now? Why don't you do it today?" And then I find out why you can't do it. And now we go, "Oh, now we're getting into the change. What has to change for your dream to come true?" [chuckle] That's pretty basic stuff, but they don't even ask it of themselves. I go, "Because once we understand what has to change, we can assess whether that's a viable or not in terms of reality. And then we can get you down to what it would take to make that change happen in your organization, organizationally, culturally, and technically."

[music]

0:13:46 KL: So what's the article no one's writing about? The one you wish you could open up at projectmanagement.com. Open up a PM journal and go, "Yes, oh, finally someone's addressing this."

0:13:55 MW: I think it is the missing link to project management success, which is the human element, and understanding that everything wraps around people. And understanding that it's not the

technology that you needed to leverage people, but it's getting people to wanna do something in unison with a single voice. And that is I think... When a project manager can get that in his project, they almost can't fail. It's hard to fail. How many projects have failed because of technology issues? Almost none. When you talk about business projects and IT projects they rarely fail because we couldn't put the framework up, we couldn't put the infrastructure together, there was no technology around to handle this broad concept. But mostly it fails because the miscommunications, the lack of appropriate planning audit, or getting people involved.

[music]

0:14:56 KL: To get a copy of Michael's how to process improvement book, The Helix Factor, email him at mike_wood@msn.com, and he will send you a PDF copy for free.

[music]

0:15:20 KL: Based in Atlanta, Dana Brownlee is a cooperate trainer, speaker, and meeting facilitator. She honed her team leadership and management consulting skills at AT&T, IBM Consulting, and EMC. Today she has her own firm, Professionalism Matters. And she works with team leaders, helping them to build effective teams and develop effective processes for managing their projects. She is also known to those in the PM world for her webinars on projectmanagement.com. Dana and I had an interesting conversation via Skype, and while we could hear each other perfectly, I regret to say the recording is slightly sub-par. Please keep listening though and you will learn some great tips for improving PM performance and how to deal with stake holders, sponsors, and slackers. Not just what to look for, but tips on what you can do.

0:16:05 KL: If you had to name the top two things that project managers really need to get their head around to improve their performance, what would it be?

0:16:13 DB: I get a lot of questions around getting everyone on the same page, moving together in the same direction, how can we be successful as a team? Another topic that tends to come up quite a lot, and it's almost embarrassing to admit it to an extent, but I feel like I just have to say it because I get so many questions around it, is dealing with either difficult sponsors, or difficult executives, or difficult clients.

0:16:44 DB: So it seems that invariably no matter what topic I'm talking about as I'm giving a PMI presentation or some other project management related presentation, I'll always get that person in the audience who raises their hand to say, "But what if my boss is the problem? Or what if the project... We just should have never been on this project to begin with? Just the whole concept of it is ridiculous." We end up talking about that quite a bit as well. I would say just teaming, jelling, getting on the same page, getting people to be accountable is a major issue, and then also kind of managing up. This concept of managing the difficult sponsor, the difficult client, or the difficult executives is a big issue I hear about a lot as well.

0:17:25 KL: These are two great topics. I like how you split those. 'Cause, one, as a project manager, we obviously manage teams, so let's get our team right. Fundamentally whatever the tools of the trade are in terms of doing the project. And then the other one, of course, is the project is this ball, this team that sits around this coherent set of activities. They're responding to a boss, an executive, somebody who has a reason for this to be happening or has a reason to know why it's

happening. Whether they're the key sponsor or not.

[music]

0:18:00 KL: We're talking about office workers here. So, let's be more specific. What does it mean to be on the same page?

0:18:05 DB: Well, one of the techniques that I highly, highly recommend is having a project charter. And so that document is great, for helping illustrate, document, clarify, some of the key elements of the project. And for me, that's really what it means to be on the same page. It's if I have 10 people in the room, but I pull them out one by one and ask each person, "What is the objective of this project?" do I get the same answer or do I get 10 different answers?

0:18:38 DB: So, one way that I could answer that is how much variability do I get in those responses? Because if one person tells me the objective is X and the other person tells me it's 2X or 3Y, then clearly we're not really on the same page. And it may seem like an academic activity, but it becomes so much more problematic as the project progresses. When we realize that a month in or a weekend or six months in, we're really not on the same page. So when I talk about project charters, it's about clarifying the project objectives, it's about defining success, what does success look like on the project? How will we know if we were successful?

0:19:18 DB: The team member roles and responsibilities, so ensuring we're not stepping on each other's feet or there's not role overlap or role under-lap. The role of the sponsor, scope, what's in scope and what's out of scope. We could have a whole discussion about scope. So, those sorts of elements, how much agreement or consensus does the team have around those key elements of the project. For me, that's what it means to define whether we're on the same page or we're not.

0:19:48 KL: Have you had an intervention where it's like, "Wow, we need to come to a charter here, we need to get to some basic definitions of role scope, overall what we think we're doing and get somebody to sign off on that, who's not in this team?"

0:19:58 DB: Certainly I've had that experience personally and even more than that, I've taught tons of project management training sessions where I present the concept. And for some people, it's a no brainer, it's part of our standard process, and I would say that some of that speaks to the culture within that particular company or organization. Some companies are much more projectized, if you will, so they're much regimented, they may have a PMO, they may have much more standard processes. Other companies and organizations just aren't, they're kinda flying by the seat of their pants or one PM does it one way, another PM does it another way. One person's doing a charter on a Post-it, another organization might have something that looks more like a constitution and they're signing in quill and ink at the end of the process with a lot more formality. So, there's a lot of variability.

[music]

0:20:53 KL: I was intrigued as you talked about the role of the team. And that takes me to another thing that you have a presentation on, which is, no more slackers.

0:21:03 DB: Traditionally, when we talk about roles and responsibilities, that's just trying to have

clarity at the outset. Now, when we look at slackers and accountability, I feel like that's a more pervasive kind of disease [chuckle] that unfortunately, many teams tend to be afflicted with, whether it's one person on the team or if it's a more systemic issue across the whole team or among different teams. So the accountability challenge and just having slacking people on your team, I think we can all relate to that. Typically, you have one or two people at a minimum, who aren't pulling their weight and that causes a trickle down negative effect on the rest of the team.

0:21:46 KL: So, what is a technique you've been able to help people with? To give us some insight and maybe a reason to come to your website, you'll tell us about it soon?

0:21:52 DB: Yeah, this is another one where, again, we could have a whole podcast just on accountability.

0:21:57 KL: And we may someday.

0:21:58 DB: Yeah. One of the talks that I have is about building a culture of accountability, and I use that wording because I think it is so important. If you think about different teams that you're on and different meetings that you attend, and even different companies that you've worked for, each one has a distinct culture. Even, I mentioned college before, even going back to college, there's some professors' classes that you know you can kinda show up five, 10 minutes late, it's no big deal. But then there's some that you know day one, you needed to have done your assignment beforehand and you need to be ready for them to call on you in the first five minutes. So, each of our teams develops a bit of a culture. And so, what I talk about is part of the solution to minimizing that slacking behavior is for the project manager to be very conscious and proactive about the type of culture that they're building within that team. And you do have a lot of different ways.

0:22:53 DB: One technique that I talk about is any time you're assigning an action item, don't just do it casually. I mean, we've all been in meetings where things just kinda come up but they're so casual about the action items that they kinda never get done. I call it action item deja vu, where the issue just kinda keeps getting tossed around and tossed around but nobody really is assigned the item with a due date and there's no formality around it. So, when I talk about assigning those action items, of course, I say real time, define the action item, the task, what's to be done, give it a unique number, clarify the owner, get real confirmation from them, real time. Either that's them nodding yes, up and down, saying they've got it. Or you get verbal confirmation. But this is the key: Ask them to suggest the due date, for a couple reasons. One, I want them to give me a date that's realistic so they can't come back later and complain about the date. Not only did they suggest the date but they suggested it in front of the entire team. So, there's also the sense of peer accountability.

[music]

0:24:04 DB: Another way is through ground rules. In my team, we had a ground rule that said, "Ownership means ownership." So that means if you take an item and you provide a due date, it's your responsibility to ensure it gets done by that date. And if something comes up in the interim, it's your responsibility to ensure that you get someone else involved, or you contact the PM, or you do something to ensure that it does get accomplished by that date. But it's up to your team, and I think empowering them is really key because they're much more likely to follow through when they're part of defining the rules and defining the process.

0:24:43 KL: One of the teams we've heard into other discussions around modern PM practices and tied to other management practices is essentially trust the worker, trust the professional, let them help pick their work load. Is that actually how you move through things? So part of what you just said there indicated some level of trust. I loved your word "empowerment." I was thinking empowerment as well.

0:25:02 DB: I think, for me, part of what's important is the why definitely is important, but it's moving... It's a bit of a nuance. It's moving it away from a hierarchical model to more of a circular peer responsibility model. Because in the hierarchical traditional model, the PM sometimes feels like you're wagging your finger in somebody's face, or you're nagging, you're the virtual nagger and all that. And so I wanna move away from that to more of a model of, "Hey, it's all about the end product. It's all about meeting our deliverables and meeting our timeline and we're all part of that success."

0:25:41 DB: So for example, to provide a practical example about ownership means ownership. For our meetings, what we decided was, instead of us walking away from the meeting and the PM has to document the notes and send them out to everybody, and then for the next two weeks I'm making calls and nagging people, or emailing people saying, "What's the status on your item?" That's not the way we work. The way we worked is once you're assigned an action item, it's your responsibility to go into the SharePoint or whatever the database is and update the status on your action item. And then it's your responsibility to report back out to the team on what's going on on your action item because you didn't take that action item to satisfy me, you're taking that action item on behalf of the entire team.

0:26:31 DB: And so that's kind of what's important for me is to build that sense of peer accountability. And then not only is it, I think, easier or better for the project manager, it's just more effective for the project long-term because I promise you, in terms of accountability, no one wants to feel like they let down the entire team. So what I have found is that people really do rise to a higher level of efficiency and productivity and accountability when they know they're gonna have all 10 of those or all 20 of those eyes staring at them. Or they're gonna be accountable to a larger set of peers as opposed to just accountable to one person, the PM.

0:27:10 KL: I like that circle of accountability, the more circular level, flattening level. It's about teams.

[music]

0:27:22 KL: I'd like to shift to the other major topic you had: The PM guide to managing the difficult sponsor. And I wanna challenge, is there such a thing as not a difficult sponsor, exec, or client? In what ways do we see non-difficult sponsors, execs, or clients? What makes a good client?

0:27:38 DB: I think there are lots of great sponsors out there. And the way I would define that or illustrate that would be the sponsor that's clear on what they're looking for and they provide you clarity and there're some level of consistency. Not saying that things can't change, but if they do change, they bring you into that. They let you know about those changes as soon possible. The sponsors who are very supportive, who are there to step in as needed and also pull back and give you your space when you need that as well.

0:28:06 DB: The sponsors that are willing to step in in a crisis, so let's say you're getting a resource pulled off your project or there's someone who's really not stepping up, we talked about those accountability challenges. So maybe you need another resource, or you need support to go with a more expensive vendor, or whatever it is. The sponsor really, to me, traditionally is there to support you and to support the overall project. So, yes, there are lots of great sponsors out there, but the problem comes in that occasionally we do run into that sponsor who is instead of providing the support that's so critical, maybe they're causing more problems with the project, and certainly that can be problematic particularly when they've got the hierarchy behind them as well.

[music]

0:28:55 KL: So a sponsor who's unclear doesn't tell you about major changes that have happened external to the project, that affect the project, right? Is not supportive in the sense of allowing you space, so they micro-manage, perhaps wanna know too many levels of detail that is not really in their role to task or to watch. And the other one you said, "Stepping in a crisis," I thought that was interesting. That's the accountability on the sponsor's side, right?

0:29:16 DB: Sure.

0:29:17 KL: It's if they somehow duck conflict or...

0:29:20 DB: Sure.

0:29:21 KL: Duck using their authority where you counted on them, right?

0:29:23 DB: Sure. One of the fields that's in that project charter document is typically clarifying who the sponsor is. There are tons of teams out there who don't even know who their sponsor is, or maybe they don't have a sponsor. And, unfortunately, they don't turn around to try to figure it out and look and see who their sponsor is until they have a crisis, and usually that's too late. You either need more money or you need fundamental changes to the project or you're having a serious resource problem or a problem with a client. A lot of times, you do need that sponsor support, so that's why that's one of the conversations we suggest that you have during the initiating phase when you're developing that project charter is not only clarifying who your sponsor is, but also clarifying maybe their level of involvement, as well as what are their expectations in terms of success for the project.

0:30:15 DB: I always ask my sponsor at the beginning, "Please finish this sentence: 'I will consider this project a success if... '" And they may not have an answer immediately, but then I put down TBD and I come back in two weeks and I ask them the same question, because one of the sayings I talk about in my class is, just because they're not really sure what they want doesn't mean they're not gonna hold your feet to the fire at the end of the project because you didn't deliver it. And that's just the truth. Some people kind of expect you to be mind-readers, and unfortunately, we're great as PMs, but we can't necessarily read minds.

[music]

0:31:00 KL: Let's talk a little bit more about kind of what you had to help people with, which is, we have a sponsor or a client or exec, who is difficult.

0:31:08 DB: Sure.

0:31:09 KL: We may have done all those things, but in fact they're difficult. Can you give us some of those teaser techniques to managing a difficult sponsor?

0:31:16 DB: Sure. I'm not sure what I'm looking for, but I'll be sure to hold your feet to the fire at the end of the project. So we talked about using the project charter to try to draw out of them what they're really looking for. Another one since I had mentioned that one already, is, "Don't mind me with my overbearing personality in your meetings, I'm just trying to help you speed things along." So that's that kind of bull in a china shop type of sponsor. You're really supposed to be leading and managing, but they're kind of coming in, taking over, or they...

0:31:46 KL: They're here to help, right?

0:31:47 DB: Yeah. They're there to help. They might even be honestly doing things you don't want, or leading... Saying things that are kinda contradictory to what you might want to say. So one of the techniques that I talk about is engaging them early. Meaning, if you know, and most of us do know when we've got that sort of personality. Get to them before the meeting. So if you know the meeting's on Friday, ask them to have lunch on Monday. And so when you sit down and you talk to them, it might sound... And really going in what you're wanting is, you're wanting them to pull back a little bit. You may want them to participate some, but maybe you don't want them to participate as much.

0:32:23 DB: So it might sound something like this: "John, I'm so grateful that you're gonna be able to come to the team meeting on Friday. I know how busy your calendar is. I'm really even shocked that you're able to squeeze it in and you know how everyone looks up to you, and so I really think that's gonna be great. I did wanna talk to you though because the only concern I have is because you are the VP, everyone looks up to you, you've been around so long, you know the industry so well, I'm a little concerned that when you share your thoughts and opinions, everyone else is just gonna kinda glom onto what you're saying and we're not really gonna get their authentic feedback and their thoughts and their ideas. And I know how important that is to you. I know how much we wanna hear what they're really thinking. So that's really kinda my only struggle. And so I was thinking, what are your thoughts on that? Is there anything you think that maybe we could do to try to prevent that?"

0:33:25 KL: And then you wait for them to come up with a suggestion. Now they might say, "Well, you know what? Why don't I just pop in for the first 10 minutes and do my little spiel or just say hi or just energize them and say I'm so glad they're there and just kinda step out, and so that way I'm not influencing? Or maybe we'll just kinda hold back and let them talk first and then I won't say anything until the very end?" So, "Oh, that's a great idea." So the whole key is instead of, first of all, me not addressing it, sticking my head in the sand pretending it's not gonna happen, I wanna prevent it from happening. I'm gonna go to them first and I present them with the problem.

0:34:02 DB: Usually they're problem solvers. They like it when of course I'm doing a little ego stroking, I'm complementing them, and all that can be very sincere, but I wanna kinda explain the problem that I'm seeing and ask for their help in solving the problem. And so typically they will come up with something that will manifest in them pulling back and them not being as dominating.

And certainly you can see how a conversation like that is much easier to have than you trying to go into your boss or your boss's boss and saying, "Hey, I need you to pull back," or, "Could you please be quiet [chuckle] in my sessions?" So that sort of technique has worked really, really well for me.

[music]

0:34:52 KL: I have one more that I wanted to ask about because it's one of the ones I find most interesting, which is the very powerful, very important executive in the hierarchy just ask them, they'll tell you. But when there's a crisis and it is definitionally outside of the project manager's control, it is now in your scope, madame executive.

0:35:12 DB: Sure.

0:35:12 KL: And they don't step up. How can we get around that where we're like, "We really need them to take the action that we can't take"? Can you speak to that real briefly?

0:35:20 DB: Sure, certainly. One of... Again, it all goes back to project charter. Almost all my answers are in the project charter.

[chuckle]

0:35:27 DB: One of the elements in the project charter that I worked with is called, critical success factors. And the way we developed this over years was we basically, at the end of each project, we do a little debrief and figure out, "Okay, what was it that went wrong?" And through that process, we found that there were certain things we really needed from the sponsor, certain things we needed them to agree to do up front. And what we found was when they didn't do it, it severely hindered the project. And when they did do it, it was part of the success of the project. So we call those critical success factors.

0:36:02 DB: And early on, when we were going through the project charter process, we would meet with the project sponsor and say, "Hey, these are the five things that we found significantly impact the success level of the project, so these are the things we're hoping that you can support us in." And it could be something just small, or it might seem small or trivial like, "Hey, when we send emails out to users to schedule interviews, we found that when they come out from your email address, we're much more successful than when they come out from our email address. So even though we'll draft the emails for you, would you agree upfront that you will send out these emails for us?" And they said, "Okay. Sure."

0:36:41 DB: Or something more significant like, "We've had problems in the past with our key resource being pulled halfway through the project. Is there any way we could get support for some additional training to cross-train some other people in case that happens?" So try to negotiate some of this upfront so that when it does happen, when we hit those speed bumps further along in the project, we've already had greased the skids, we've already had some of that conversation. And so that can be a technique that we found that can be really useful.

0:37:12 KL: Thank you for that. Again, another quick teaser technique there for us to think about. I'm hearing a fundamental call to being very proactive. You own setting the culture that will give you the accountability you want. You need to drive the charter 'cause the charter sets up so many

things. When you see your executive not going where you wanna do, you need to have that lunch two business days earlier. You need to make that call.

0:37:34 DB: Sure. Sure. Project management is all about planning, so if you do the planning right, the execution is just so much easier.

[music]

0:37:44 KL: To listen to Dana's webinars, go to projectmanagement.com or visit her website: Professionalismmatters.com.

[music]

0:38:01 KL: Don Wyans has a background in technology, particularly technology infrastructure, with decades of experience in project management. His specialties include management, innovation, leadership, communication process improvement, project management, sales mentoring, and staff development. He is currently the director of implementation for ADP. His role is to help their project managers use the best possible practices as they implement applications for their clients.

0:38:29 KL: You had an interesting statement about the role of the PM in terms of their relative importance. We think of the PM as being kind of in the center of action, and you seem to have a sense of there was almost a revolutionary thought happening here.

0:38:44 DW: We're the project management institute, and so it puts project management at the center, but really in the grand scheme of things, I think the project manager is the third most important thing about a project. The first and most important thing is the goal of the project. Truly the goal is the project. It's the Alpha and the Omega. You don't create it, it's given to you. If it doesn't exist, you don't have a project. If you don't understand it, you're gonna fail, and if your team doesn't share that same understanding, you're just gonna wander. So the goal is the most important thing.

0:39:24 DW: Second most important is the team. And I look at a project team like a very complicated, very specialized machine. It needs to be set up very carefully, it needs to be maintained carefully over time, but it's worth the effort because this is the machine that creates the product. This is what makes us money. And from my perspective, the goal and the team deserve my best every day. They're my focus. That's why I'm third. I need to give them my leadership, I need to foster communication, I need to make sure that there's continuing development. It sounds kinda corny, but I think that as a project manager, sometimes we're like the wagon master in an old western.

[chuckle]

0:40:13 DW: And that wagon master was hired by these settlers to get them across the mountains. He didn't know them. They brought him in to do a critical job that they knew they couldn't do themselves. He steered them around all this trouble, protected them from danger, protected them from themselves. He gave them that tough love where he's always ready to tell them what they needed to hear. And when they got to Oregon, he turned around and went home, and led another wagon train, and they felt like they succeeded. And that has always been one of the great paradoxes

for me in project management. If I do my job really, really well, people wonder what they needed me for in the first place.

0:40:49 KL: That makes it for a hard sell for follow-on work, I imagine.

[chuckle]

[music]

0:41:00 KL: Now, I thought that was an interesting topic, and the reason I thought that was because it seems... You seem to be implying that perhaps people don't think of it that way. Are you observing that when you go in to do an implementation or to work with clients that their experience with project managers may be more where they're focused on the project manager and his or her personality or his or her approach?

0:41:20 DW: I think it really depends on their experience with who that project manager was, or maybe who's burned in the image in their mind. And there's a couple of stereotypes out there that we run into every once in awhile. There's the list maker, that person that just combines a name, an action, and a date, and maintains that all in an Excel spreadsheet. And then you got that checklist keeper that's got a little bit of a passive aggressive bend, and they turn into ankle biters that just follow you around and loudly proclaim what's on the checklist. And anybody who wants to can call themselves a project manager, and they frequently do, and that's what pulls people off the perception of the value that we can provide. The project goal is the project. This is the reason that we're here, and if we start to stray from that, we're gonna wind up someplace, but it's not where we wanna be.

[music]

0:42:21 KL: Version 6.0 PMBOK coming out. What's it missing, what's gotta be fixed?

0:42:25 DW: Well, I think that there's... I'm not sure that it's missing much. I think it's a great document. Okay, so I really enjoy project management, maybe I look at it a little bit more of a religion than I should, but I look at the PMBOK as being descriptive of our common beliefs, as opposed to being very proscriptive of what exactly our behavior needs to be. You can take it too literally, and that can get you in trouble, but if you don't pay attention, that's gonna get you in trouble a lot quicker. Some of the things that I think that really don't get the play that they should in the marketplace of project management ideas, one of them is the idea of proportionality. I don't think that's stressed strongly enough. That we need to keep everything in scale with the project that we're doing. We talk about project management like it's one thing, but it's not. You can't generalize project management any more than you could generalize sports. Golf is a sport, base jumping is a sport.

0:43:32 DW: And they have some stuff in common, but if you're gonna be successful at either one of those, you really should plan on using different shoes. In project management, application development thrives with techniques in Agile. But that might not be the best choice of a primary technique if you're in the process of building an underwater pipeline. You need a more thoroughly planned approach. So that sense of proportionality, that sense of generalization, I think that needs a little bit more emphasis.

0:44:07 KL: Yeah, I see it as a tradeoff. If the inherent nature of the project is very chaotic, it may need more structured project management. If it's kind of known what they're trying to build, it may need more Agile or a more rapid project management, or flexible project management in a certain sense.

[music]

0:44:31 KL: Where can people learn then, what they need at the scale they need?

0:44:35 DW: I think that there are some elements in that that we should look at, in how they affect every single project that we do. This idea of progressive elaboration. It gives us permission to start even if we don't necessarily know where we're going. In fact, it probably makes it an imperative. Get going, and figure out where you need to be. It builds out some fairly powerful concepts, that this idea of "better, not best". It's a very nice, infinite goal. It's the basis of continuous improvement. But it also says that, as a project manager, you don't need to know it all in order to organize and direct this activity.

0:45:15 KL: Or to get started. Bias towards action is one thing that I observe as important.

[music]

0:45:24 DW: The idea of a work breakdown structure, it is our secret weapon as project managers.

0:45:29 KL: How so?

0:45:30 DW: You get the goal and then you need to start planning, and that planning happens in multiple dimensions, in multiple directions. It's so tempting to start with a schedule, to start with a list of resources. Start with a WBS. Release yourself from those constructs and just focus on the work. And then, once you get that work out there, whatever patterns are within it will start to reveal themselves. So, even though it's hard to write a WBS without it turning into something else, let it turn into something else on its own. Do that hard work and let those patterns emerge and use that to be the basis of your plan.

[music]

0:46:15 KL: The work breakdown structure, how is it that people need to be thinking, such that those patterns begin to emerge?

0:46:21 DW: Well, start with the work itself. Pick the level that you wanna operate and be consistent within that level and start to define the things that need to happen in order for the product to be produced, the goal to be reached. Do your best, use Post-it notes, spread them all around the room, rearrange them, look for those patterns. Invite somebody else in, either to join in the planning, or somebody that you can explain that to. And listen to yourself as you make that explanation. It's an area where it really does take some hard work, so work hard. With that effort, it will turn into something useful.

[music]

0:47:04 KL: It does sounds true that we often get that backwards. We work from a schedule.

0:47:08 DW: It's so easy. Or it's so easy to say, "Here's our team, and so if I've got a designer, let me think about what a designer should do."

0:47:16 KL: I hadn't thought of it that way. I think of it as the executive's hand down, "Here's the thing I want, and here's when it's due. Go."

0:47:21 DW: There's three constraints, right? So whichever one's the most painful, it's probably where you're gonna start. And fight that urge.

0:47:29 KL: Fight the urge. So there we go. One of the lessons is fight the urge, no matter what seems most painful, make sure you know what the work is.

[music]

0:47:43 KL: You seem to have a take on risk as well. What are your thoughts on that that people need to pick up on?

0:47:49 DW: Well, I talked about the goal as being the Alpha and the Omega of the project. I think that risk management is the Alpha and the Omega of project management. Really, it's the reason that we have project management is to manage risk. Plain and simple. This is the core of everything that we do. If all we had to do was organize the work it could go do itself. We could just post that note up on the bulletin board and everybody could go do their aspect. It's required that we are aware of, ready to respond to, anticipating, planning around, all these different risks. To have a positive attitude toward risk management has some amazing positive impacts on the team.

0:48:36 KL: It's a fundamentally hard area to work with. It's the real dynamic aspect of the project, in my mind, besides just kind of worker competence to it. Can people get the job done? But even that becomes a risk itself. I think it's hard.

0:48:50 DW: One of the interesting things that I've noticed over time with risk is... And I've always worked as a vendor. So I'm doing these cooperative projects with my clients, not for my clients because they're participants in them as well. So when we sit down to do risk planning that is the moment when they're sold. The process of trying to identify these things that could go wrong or that could go very right. Let's not just limit it to the threats, but bring the opportunities into it. Invigorates the whole project team to think about these things that could happen. From a client/vendor standpoint, it reassures the vendor that you've walked this trail before, that you've taken the time to be mindful of the things that could threaten them.

[music]

0:49:43 KL: How can we get better at risk management? 'Cause again, I see that's the one that's so complicated for people to handle. They know how to work with the team to say, "You know your work, tell me how you can break it down and explain it?" We can all record it, we're gonna communicate, we can work on how we best keep our communication going taking care of the team, monitoring to the schedule, making adjustments. But risk is this whole almost creative process. I get

concerned watching risk registers as a very mechanical way. I think they're a nice guide, but it's almost like you kind of fill it out and then you would say, "Oh, there's a bunch of risks I can't really handle anyways. It doesn't really matter." How do we get better at risk management in the way you're talking about it? 'Cause you're really implying that's the magic... More than that, you're saying, that's the magic that makes you a project manager and a valuable project manager.

0:50:28 DW: I do view it as a creative effort. And I've worked with many people that are new to the profession and are forming their habits. I've found it to be very helpful to give them some repeatable processes almost to the point of scripts. And the script that I like to share with a new project manager as they sit down and start to plan risk with their team, is to have them invite their team to use their memories and use their imaginations. Use your memory to think back to other projects or other activities that you've done, whether it's related to the task that we're about to undertake or completely unrelated. It's to your daughter's wedding, it's to a home improvement project you did. It's to whatever.

0:51:14 DW: But what unexpected things cropped up and affected those projects, positively or negatively? And then, use your imagination. Look at the unique... This course that we think that we're going to follow because we've probably laid out some of the basic components within the WBS at this point. What are the things that could jump up and bite us here? Pass out the Post-it notes and everybody start to write as many threats, as many opportunities as you can identify. Let's get them up on the white board, let's build that affinity diagram that shows how those group out. And let's see what are our threats that are related to communication? What are our opportunities that are related to the price of tea?

0:51:55 DW: Whatever the project team sees as bonding elements within those they identify and group those. And then, continue down the classic path. Let's prioritize, let's find what we can address. Let's maintain that sense of proportionality so that we're building a risk plan that's appropriate for the project that we're doing. A 90-day project doesn't need a 90-page risk plan, but in my mind every project needs a risk plan even if it only exists in our mind, because we talked it over at lunch, the three of us.

0:52:26 DW: The people that are in the room planning the project are probably the people, in many cases, will be the ones executing the project or that component of the project. So fully engaging them in that... Pulling it from their right brain and their left brain and having them involved in the prioritization, that's communicating the plan as well. You almost don't need to go any further than that because they're so drawn into that process done correctly that that remains with them throughout the rest of the project. They've been trained on what to do when one of these risk events seems to start to present itself.

[music]

0:53:13 KL: Another thing you had written here I thought was interesting was, what constitutes a good PM? I don't know, but what constitutes the best PM is the one who actually delivers the project.

0:53:22 DW: Yeah.

0:53:23 KL: When does that come from? What are you observing that makes you feel that?

0:53:26 DW: Well, so again, I'm a vendor. And sorry, but the purpose of a vendor is to make money for the shareholders, and we don't make money doing projects. We make money finishing projects, typically that's when you get paid. So the very best project managers are the ones that get the projects finished. Now, doesn't mean finished the soonest, although sooner is always better than later, but that quality needs to be there, that happy client who doesn't have the need for re-work needs to be there. So that's led us to really drive people to recognize that this isn't about doing projects, this is about finishing projects.

[music]

0:54:12 KL: Do you anticipate any change in project management in the future?

0:54:16 DW: I think that the change that's affected me the most is the emergence of tools that allow us to succeed as virtual project managers. That's an area that's particularly interesting to me. We really do work best together when we are together. But the reality is we can't always be together. And in some cases, we shouldn't always be together. I'm looking for ways to leverage new technologies and new approaches, not from the standpoint of I want my virtual team to be as good as a local team, I wanna find ways to make my virtual team better than a local team. Maybe I'll get there, maybe I won't. But I think that's one of the big change areas I see in the future.

0:54:58 KL: Yeah, that's a really good point. It's more than the tools, it's thinking about how to stimulate and engage that behavior with the tools. How would you change how you have a dialogue?

0:55:09 DW: Well, McClewan came up with the idea that any time a new media appears, the first thing it does is it imitates the one that it's replacing. So we see the emergence of things like simple, reliable desktop video conferencing. Since we couldn't all be in the same place at the same time, out came the speaker phones, out came the dial-up lines and we'd all conference together via an audio conference. Well, we can do a video conference now. But really, all we did was imitate an audio conference. But now we're seeing techniques with the use of video to time shift a weekly status meeting. A weekly status meeting that you don't all attend and participate in at the same place at the same time. It's sort of a way to DVR your status meeting.

0:56:04 DW: As the leader, let me get the presentation part of that recorded and distributed so people can see that. We will suggest a time that, as many of us can practically gather, we'll gather. We'll video conference through that. We'll record that video conference and share it with the rest of the team in some sort of a social environment where it's easy for them to view that video and then comment on that. And add the comments that they'd make if they were able to participate in a way that everybody is able to see and respond to. So we can have this conversation take place over the period of a couple of days. It helps us cross time zones. It helps us deal with the schedules of very busy people. But it... Boy, it sure comes out very differently than, "Let's just pretend we're sitting around the table while we're all on the telephone." And I think it's taking advantage of what the new media provides.

[music]

0:57:00 KL: Okay. So the virtual world allows for more interesting collaboration. As the reality of

long distance interaction shifts and methods of communication expand into new formats and means of documentation, the concept of collaboration enters new territory, and even basics like scope and schedule take on new meaning. After listening to today's podcast, you may never think of project management the same way again. Project managers take a back seat to the end product. We're a product of our education, which is focused, perhaps too much, on tools and techniques. And we are apt to lose sight of the actual purpose for our project.

0:57:36 KL: We heard this before on earlier episodes, that we need to focus on the value of the project and on delivering that value. All of our influencers remind us of the importance of the team, how the team works, how the PM leads the team to the organizational processes. And that, in fact, the PM is there to keep the team functioning. So then, what about that PM? There's a good case to be made that risk management is the real reason we project managers are here. Of course, the basic precepts still hold true.

0:58:05 KL: The human element and cultivating working relationships are most important. Communication. Real communication. Scope and planning, which really should start with scope. PMs have to fight that urge to kick off each project by setting up a schedule or staffing the team first. Those are subservient to scope. In the end, project management is a creative effort. These are just some of the topics that are on the minds of those who write and share their ideas with our community as a whole. Check out projectmanagement.com for more ideas and to pursue your own opportunities to become an influencer. Special thanks to today's guests Michael Wood, Dana Brownlee, and Don Wyans.

0:58:47 S5: Our theme music was was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, and Lionel Lyles. Post production performed at Empowered Strategies and technical and web support provided by Potomac Management Resources.

0:59:02 KL: PMPs who have listened to this complete podcast may submit a PDU Claim. One PDU in the Talent Triangle Technical Project Management with the Project Management Institute's CCR System. Go to CCRS, select education, and then online or digital medium, and enter provider code C046, the Washington, DC Chapter. And the title PMPOV0029. Influencers Part One, New Perspectives. Make sure to select one PDU under the technical category at the bottom. 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, and leave your comments there. Or you may contact me directly at Kendall.Lott@PMIWDC.org. I'm your host Kendall Lott, and until next time, keep it in scope and get it done.

1:00:00 S5: This podcast is a Final Milestone Production. Distributed by PMIWDC.