

## #48. O'Brochta, Kallman, & Schwartz: New Releases \_Conversations with the Authors

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**00:04 Speaker 1:** Hey, PMs, for those of you in the Washington DC area, the University of Maryland's Project Management Center for Excellence is offering its fifth annual project management symposium, Turning Knowledge Into Practice, on May 10th and 11th, 2018 at the university's college park campus. Join over 370 project management professionals from the Baltimore-Washington region and from around the world for DC's premier project management symposium. This symposium will feature six keynote speakers and over 50 individual sessions. You'll share experiences, make connections, and learn the best project management practices in a wide range of topics. I'll be there recording for the PM point-of-view. Maybe I'll see you and maybe I'll get you on the air. So tell your friends and check out the website for the topics that interest you at [pmsymposium.umd.edu](http://pmsymposium.umd.edu). That's [pmsymposium.umd.edu](http://pmsymposium.umd.edu).

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**00:58 Announcer:** From the studios of Final Milestone Productions overlooking the White House in downtown Washington DC, this is PM Point of View. The podcast that looks at project management from all the angles. Here's your host Kendall Lott.

**01:14 S1:** Project management is a fertile field for writers. The PMBOK® is just the beginning, the progenitor you might say, of a whole genre of books and blogs and articles that are sprouting up at an astounding rate. But our profession goes much beyond the tools and techniques. For this episode, I talk about some recently released books with their authors. I hope the discussions inspire you and maybe motivate you to do some extracurricular reading to keep your project management practices in tune with the times.

**01:41 Michael O'Brochta:** This subject is the most popular topic in my consulting business, and it's the most popular topic of all the presentations that I've given.

**01:53 KL:** I am pleased to have Michael O'Brochta with us for a second time, and there will be more. The last time we were together, we discussed project management in intelligence. Check out PM Point of View episode number 28, Spies Like Them. Now, he's here to talk to us about his new book, How to Get Executives to Act for Project Success, which came out in February 2018.

**02:16 MO:** Just last year PMI did another one of their Pulse of the Profession global surveys, and they said, as a result of the survey, "Actively engaged executives continue to be the top driver of whether projects meet their original goals and business intent."

**02:41 KL:** Your title, in my mind, has two premises in it. One is that executives need to act. And,

secondly, that they don't tend to. Now, is that what we're really saying here?

**02:53 MO:** We certainly are Kendall. When Towers Perrin surveyed 30,000 people worldwide, 75% of them said, "Kendall, you know what? My executives are not doing what they need to do to help me succeed." Same thing in the US federal government. The Council of Excellence did a survey. Three quarters of the project managers in the government lament the same thing.

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**03:30 KL:** Is this a lack of positive action? In other words, they need to make an affirmative step to do things? Or is it more of a response to barriers like the overcoming of a negative force?

**03:43 MO:** The answer's both. In some cases, there are barriers that the executives confront, real barriers that they confront that limit even the most well-intentioned executive. For example, not every executive has full control of all the things they'd like to do to support their project managers. In fact, when you survey executives, the number one complaint executives have is they don't have enough control over their own budgets. Even if they do want to act, they're constrained. Now, to your other point, Kendall, executives, also, have a limited understanding of what needs to be done to support project managers. After all, they're not project managers. How would they know? And so they need to be told, and that's where we can come in. Instead of just waiting for the executives to act, project managers can actually take charge of the situation. And that's why it's a how-to book and there are a number of exceptional steps project managers can take to move this thing along in their direction.

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**05:06 KL:** I've noticed a tendency in some of the PMI related events that I've attended in the last decade, to want to almost be apologetic for being a PM and saying, "The PMs need to be at the executive level. We need to be operating at a different level." My claim has always been, "I feel that PMs should operate as project managers first and foremost." There's a reason there's an executive layer and a PM layer. But what I just heard you say was something interesting. I was concerned you were expanding their role. It sounds like you're arguing mostly for an education and communications role.

**05:37 MO:** I'm doing both. Let's take the role part of your statement for a minute. And I want to take a look at the definition of project success.

**05:47 KL:** I was going to ask you about that too because there's a question of appropriateness here. What is appropriate for a PM to take on? Right?

**05:53 MO:** Yes, exactly. And I'm going to use the definition of project success to illustrate the point that the role has changed and expanded for the project manager, like it or not.

**06:05 KL:** Okay.

**06:06 MO:** So, let's just take a look at the definition. If you look at the early definition of project success, modern project management, and we'll say that's the 1960s.

**06:17 KL:** Okay.

**06:17 MO:** And if you take a hypothetical case from the CIA, right, I used to work there, but let's just make this hypothetical. And in the '60s, if you wanted to succeed, in developing an audio listening device, a bug, if you will, Kendall, all you had to do was to get it to work. The definition of success was one dimensional. It worked. But, then along came the '70s, and the definition expanded, it had to work, but you know what? You had to deliver it on time and on budget. And, what do we call that, right? Triple constraint. The '80s it expanded again. Now the project manager has to do the Triple Constraint and they've got to satisfy this person or this organization called *The Customer*. Right? It has to work, it has to be delivered on time, it has to be delivered on budget, and by golly, somebody has got to be happy about it, like the customer. Nowadays, '90s and beyond, it has to cause some business interest to be improved.

**07:31 MO:** The organization has to be better, something has to be better at the business level. And, that means my audio listening device, in addition to doing everything else and pleasing the customer, now has to produce useable intelligence, the business need. Now we have a project manager responsible for building a project, let's say the audio listening device, and he or she are not considered fully successful, unless the audio they collect is useful to a member of Congress, or the Executive Branch of the Government. My golly, who can achieve that goal? Not many people, at least not many people without some executive help.

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**08:23 KL:** What can you tell us about some of the steps a PM needs to take on here and that your book would help them understand?

**08:28 MO:** My favorite step is the step for the PM to gain power. In order to get anyone in an organization to do what I want, right? I've got to somehow influence them. For the most part, if I'm a project manager, Kendall, I don't have a lot of authority, right?

**08:50 KL:** Right.

**08:51 MO:** I work in a matrixed organization, I got multiple bosses, but I need some kind of power if I'm going to influence people. If I'm going to get my executives to act, I've got to somehow influence him/her.

**09:04 KL:** How do you describe power here?

**09:05 MO:** It's the ability to influence people, to accomplish the objectives of your project.

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**09:19 MO:** In order to get an executive to act, the project manager would be well served to develop their power. I've now made the case that they have very little power because of title or position. However, allow me to cause you and your listeners to think about the source of power they do have. Let's go back to the '60s and '70s for a minute. Let's go back to the most popular series on television. It was a series set in the Korean War.

**09:51 KL:** From the '70s, MASH.

**09:53 MO:** So there's one character in that show that seems to be at the center of everything, and that character is Radar.

**10:01 KL:** He's got the information.

**10:03 MO:** Radar's a clerk. And yet, Kendall, you nailed it. Radar knew more than anyone else in that show. He had access to information, in fact, in the show, he knew things before they happened. Right?

**10:15 KL:** Right.

**10:15 MO:** So, Radar has what we call, Expert Power. He is an expert on a set of topics that are important to other people.

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**10:30 KL:** You're suggesting, it seems to me, that it's about knowing what's going on and having information about perhaps the alignment and the value of the project, is that where we're headed?

**10:40 MO:** The single subject that Project Managers know more about than anyone else in the world, Kendall, they are the world's experts, is their project. They can take the information they know, and they can communicate that to other people, in such a way that the other people derive benefit. That's the value of communication. So you put the information you know in a context that's important to someone else.

**11:06 KL:** Yep.

**11:06 MO:** Let's say the executive. And, the executive benefits. Well, you've just grown your power. And, if you do that often enough, with enough executives, by golly, they're going to start to rely on you. One day they're going to ask you for your opinion about something unrelated to the project, Kendall. And that's the day you have arrived. You have just grown your power to the level you need to, to begin influencing these executives to take actions for project success.

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**11:48 KL:** Once you're in the trusted role, then the executives will turn to the PMs to get that information that they were lacking to take action.

**11:57 MO:** They sure will. And, that's why the subtitle of the book I chose is 'Building a strong, mutual partnership.' Now, I want to talk about the executive for a moment, if I may.

**12:06 KL:** Yeah, yeah.

**12:08 MO:** There's something in this for the executive. And so, one of the steps the project manager can take is: they can understand what's in it for the executive. I'll point to a study that took place about 10 years ago, as I recall, surrounding the topic of why executives fail. The number one reason

executives fail is because they fail to deliver on their commitments. In fact, the executives who fail to deliver on their commitments are three times more likely to get booted out of the C-suite than everyone else. Let's think for a minute, deliver on commitments, "Hey, what's our job as a project manager?"

**12:57 KL:** That's it.

**12:58 MO:** That's it, baby. We deliver on commitments. So, executives are highly dependent on project managers. So, that's the mutual partnership I'm talking about. We need the executives to succeed but do you know what? They need us.

[music]

**13:23 KL:** You're talking about the natural alignment of those roles. So, it's not having to make a case to do something unusual. It comes from what a project manager knows, what an executive needs and so it becomes incumbent on the project manager to learn to speak to the executive that way. I think that's an elegant solution because it fits their natural inclinations, if only they would talk, right?

**13:46 MO:** It does fit their inclinations. We don't talk so much about what's in it for them, we don't talk about the fact that their careers are going to tank unless they help project managers. We talk about the increase to the organization's bottom line, "Let me have successful projects." And thank goodness, we have a decade or more of research showing just how well organizations do when they adopt project management.

**14:14 KL:** It struck me that there would have to be a data element to this which is being able to speak to some real and hard facts around those benefits.

**14:23 MO:** Yeah.

**14:23 KL:** Or it strikes me as that. Is that something PMs need to start stretching towards more? Or is that a function of the organization's maturity before we can do that?

**14:32 MO:** So, for most organizations, and most means that they have a limited organizational maturity, they have not yet arrived at the full understanding of the benefits of Project Management. And so, it behooves the project manager to educate those around them. And as I say, for the last decade or so, we've had some fantastic research documenting the benefits of project management. In the early days, it was a religious discussion. Well, thank goodness, now, it's a fact-based discussion. So the prudent action for the project manager to take is to take advantage of the plethora of studies on the subject of the benefits of project management.

**15:27 KL:** Are those listed in your book?

**15:29 MO:** Oh, gosh, yeah.

**15:30 KL:** Okay.

**15:30 MO:** There are just dozens and dozens out there and they all say the same thing in different

forms. Mature project management practices produce, and then fill in the blank, higher customer satisfaction, higher employee retention, higher return on investment, shorter time to market.

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**15:58 MO:** The project manager, in order to succeed at developing their expert power, they have to be trustworthy, Kendall. As the former chair of the PMI Ethics Committee, you're not going to be trustworthy unless you have strong, visible ethics.

**16:15 KL:** How do you describe and define trust and trustworthiness here?

**16:19 MO:** So, earlier, I defined power as the ability to influence others for the benefit of your project. And so, trust is the ability for others to allow themselves to be influenced by you. They trust you. So, if they allow themselves to be influenced then, by definition, they trust you, and if they trust you, you must be ethical. You must be honest. You must fulfill your responsibilities. You must respect others and they must respect you. So, you must have all four values of the PMI Code of Ethics.

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**17:01 KL:** For PMPs who might have forgotten, our ethical code highlights four values: Honesty, Responsibility, Respect and Fairness.

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**17:13 KL:** And we also know that a lot of projects fail. How does the failure of executives to act cause this actual problem? What is that linkage?

**17:20 MO:** So back to the hypothetical CIA audio-listening device. So the definition for success today is expanded to such a degree that I, as the project manager, would not be considered successful if the device worked, if I delivered it on time, if I delivered it on budget, if I pleased the customer, it would not be successful if it did not produce usable audio intelligence, useful to some member of the executive branch or Congress. And I can't do that by myself, Kendall. There are people in my organization above and beyond my pay grade called executives that can make that alignment happen.

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**18:11 KL:** I'm fascinated by this, as you lay it out historically and have made this chain of reason. It's almost like the project management role worked really hard to make sure it could define itself, right? That there was scope to this profession. There was scope to the activities and actions and purposes of project managers. And it's almost like we're reintegrating it. We've forgotten so much about the actual business value and it doesn't even translate into our tools often, that we've worried about making sure we can execute the project, that we stand alone, that we're a thing. Your argument seems to go very deep to me which is, it's not about making sure people recognize you, it's that the executives couldn't achieve without these things done, and actually you can't get them done without the executives, who have a different job and their job is to meet these stakeholder needs. It's almost like we're reintegrating it. Now that we can stand alone, we're ready to stand back

with the group.

**19:05 MO:** Well said. And the industry has begun to come to grips with this because there's now more recognition of the business drivers related to projects. That it's now an interest on the part of PMI and others on integrating the business elements into the solution. So yeah, there's an increasing recognition about the dependence that we must have, between projects and the business outcomes.

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**19:42 KL:** So as the definition of project success has evolved over the years, more and more is expected of PMs. In order to understand how we can bring optimal benefit to the organization, we need more data than just the parameters of the project. We need access to information from the upper levels. And remember, the folks at the top have less power than you might think. While you, PMs, have more than you might imagine. You have a wealth of knowledge regarding actual on-the-ground details of your projects, the people, the possibilities and the pitfalls. The C-suite needs your help as much as you need theirs. They can benefit from knowing more about what's going on with their investments and projects, and you will be able to steer your project more effectively with information they provide, in terms of the bigger picture and the desired benefits. You can find Mike's book, [How To Get Executives To Act For Project Success](#) on Amazon in hard cover, and on Kindle.

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**20:42 Ted Kallman:** There's only three things that happen naturally in an organization: Friction, confusion and underperformance. Everything else requires leadership.

**20:54 KL:** That's my next guest, Ted Kallman, quoting the late great thinker, writer and management guru Peter Drucker. Ted is an enterprise agile coach, a key note speaker and an author. He has been a CEO, COO, CMO and the head of a PMO in the US and in Europe. He has managed projects for Whirlpool, OnStar, Steelcase, ZF and more. His latest book, written with his brother Andrew, is called [Flow: Getting Everyone Moving in the Same Direction and Loving It](#). So what is this Flow?

**21:25 KL:** I saw your definition in here as the state of optimal performance achieved by applying a clear, consistent and unified vision at all levels of the organization. This is really interesting, you're taking a concept of Flow that others have talked about and you're definitely applying it around this concept of the consistent and unified vision. So it functions on vision and you've moved it to the organizational level.

**21:48 TK:** Well, as a perfect example of that and how it works and the strength and the power of it. The gentleman I'm working most closely with at ZF is the director of methods incubation, but now he's working on streamlining methods across the entire enterprise in China, Germany, US, Mexico etcetera. And so we had to first identify what's the vision. Now on the ZF web page there's a vision statement that's 49 words long, it's accurate but nobody remembers it. If you dig deeper, they have for their mobility division, for the autonomous driving cars, they have their vision zero. Zero accidents and zero emissions. Well, that's beautiful and perfect and it's communicable. And so we ripped that off and created a vision for methods incubation which is zero friction.

**22:55 TK:** So what are you trying to do if you're working with improving your methodologies? You're looking for friction points, whether it's organizational or process or people friction points, and identifying those in your value stream. And then how you then remove that friction? And if you could adjust your methodology to eliminate friction, the entire enterprise will lift. And so the vision statement for methods incubation is zero friction. And now as he's informing his work, he's using that with his teams and with the people that he's communicating with. One of the guys in IT grabbed it and he goes, "Oh, well, that kind of works for us, because what we want is zero down time." And it's like boom. And so now it migrates and it's very quickly communicable as an organization and now he's making a sign for his work area, zero friction zone, to keep it visible and in front of himself and everybody else coming through his area to remind them this is our one thing.

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**24:04 KL:** When I was reading the book, I was also struck by... We're talking about vision that has cascaded or decentralized through the organization, it's like the vision at the project level or the program level. There you talked about going down into the website at the mobility team or the continuous improvement team. Actually right there I was wondering if you could reflect on that because I don't know that that's common for people to hear. They're used to hearing... The organization is supposed to have a vision." But it seems to be that you're saying it's whatever the group of people are working on, they need a vision.

**24:34 TK:** Right, and John Kotter from Harvard says that the vision of an organization is under-communicated by a factor of 10. So they have that vision on the website and everybody just assumes, "Well, we had a strategic planning retreat and we came with this and it's accurate." We'll put it on the website and in a binder on the shelf, and nobody ever looks at it. It doesn't inform your work or your decision making at the task level. So if your vision is only 50% clear at the top, that means you're only 2% clear for the person delivering the work. And so it's just remarkably disconnected from any strategic initiative for the people doing the work. And most projects are disconnected because they're just functionally, tactically doing whatever the project's aimed at, they don't do that continuous loop back to, why are we doing this?

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**25:31 TK:** I worked with a team at SAF-Holland and the CEO brought me in to work with the new development team, and we cut their new product development time from 36 months to 11 by structuring it this way. One of the things, obviously, we were training was how do we get that vision from the top, down to the people doing the work? And one of the ways that they did that is they changed their project template and they came up with... They posted at the top of the template the vision statement for SAF-Holland, and then right below that was the blank area that says, "What's the vision of this project?" And so the first step that the project lead has for projects for SAF-Holland is to think through with the team and the relevant stakeholders what is the vision for this team? What's our white hot why? Why are we doing this?

**26:24 TK:** And so, by doing that now the people in the project, every time they open up that template, what do they see? This is why we're doing this project. Now, here's how my work fits into delivering on that value, by the way, it's the zero friction delivers on vision zero, which delivers on the upper level vision of reliability and sustainability for ZF worldwide, and you just continuously focus that back and loop it back.

**26:53 TK:** And when you say that most companies, you probably don't see that, I would say 98% of the time we do not see that connection, because the vision and strategy are worked on at the executive level, projects are delivered to deliver value but they're never connected, they're never linked back to the strategic initiatives in a way that's continuous and informs the work so that people are continuously asking the right questions and making the right decisions about what's the highest value. It should be the value that's being delivered to obtain the vision.

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**27:33 KL:** Yeah, the big lesson for me out of this was "Don't be afraid to decompose a vision," and it's not about your portion of the large organizational vision. It's about what is the 'why' still for this whatever task or project, or operational area that essentially has to fit within the larger vision. But it's not about having an input to it, it's that this group does something for some reason.

**27:56 TK:** It's really the Toyota Production System "5 Whys".

**28:01 KL:** The "5 Whys": According to Taiichi Ohno, the developer of Toyota's Production System in the 1950s, by repeating 'why' five times the nature of the problem as well as its solution becomes clear.

**28:12 TK:** But you're doing the why as attached to the vision, and you just keep asking those relevant 'why' questions in order to get down to the irreducible minimum of "What's my vision? Why am I doing this?"

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**28:32 KL:** The main part of your model actually says, "We moved past vision into a couple of other parts," and I invite people to read about this, but your next piece was "The right people... "

**28:42 TK:** The four Rs, actually. So when you're moving down to the individual level, it's the Right People who have the Right Attitudes and Values, because the cultural values are important, who are taking the Right Actions. Now, you're relating the people to the plan, will get the Right Results. And then if you're not getting the right results, you decompose it backwards and say, "Well, are the people taking the right actions?" Well, if they are then there's a disconnect somehow with the values or attitudes. And, if that's in alignment still, then you have to go back to the original idea, "Are we really focusing on the right thing here?"

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**29:24 S1:** Have you been able to work with leaders to understand how to decompose that right person concept?

**29:29 TK:** The way we've worked that in the past, Kendall, is really with the tools of the organization. So when we go in and I was working with Bethany Christian Services, which is a case study in Nehemiah effect. They use Balanced Scorecard and so we used their tool to structure within their system, and they use Myers-Briggs as well as the DiSC tools for the individual. But then we use those tools through the lens of the four Ds and the four Rs.

**29:58 KL:** We've already heard about the four Rs. The Right People with the Right Attitude, taking the Right Actions for the Right Results. Now we have the four Ds, they are: define, distill, deliver and drive.

**30:11 TK:** And that's why we say it's really method agnostic. You could put anything against this lens, it'll give clarity. It'll make it better. As a matter of fact, we had a research group in Sweden, and they compared two agile teams with a Flow team. And the Flow team outperformed the agile teams by 30%.

**30:37 KL:** Well, let me ask you about that because one of the cool pictures in your book, I think it's one of the first graphics, is showing how the different develop methods from waterfall to lean to agile, Ex P. Then you had those kind of underneath movements or larger methods, and then you said, look Flow kind of resides above all of it. It's literally methodology agnostic as well.

**31:00 TK:** Exactly, it doesn't matter, because we know by applying our frameworks in focusing on the vision, making the work visible, short cycles small batches, continuous improvements, short cycles and focus on the whip. And when you do that and apply that no matter what the project or the method is, you'll see acceleration of performance.

**31:23 KL:** Yes. You just blew through that really quickly. Short cycle, small batch, continuous improvement, that was one of the things I got out of it, it was a lot of focus and make it small, higher throughput with smaller batches basically.

**31:35 TK:** Yeah. It's like, you're in the DC area, right?

**31:39 KL:** Yeah.

**31:40 TK:** Okay. So if I go out on the Beltway by Tyson's Corners in about 5:10, how fast am I going?

**31:46 KL:** Not much. [chuckle]

**31:48 TK:** Not very. And that's because you have an at-capacity or over-capacity system. And then when the things heat up, executive managers walk around the corner and go, "Hey, we need you to do this too." And so, I know I can make this work better by putting more cars in the system. And what happens when you put more cars in an over capacity system? It slows down.

**32:14 KL:** Yep.

**32:14 TK:** So if I want to get to optimum throughput and high performance, I actually have to reduce the number of cars in the system to increase throughput and reduce cycle time. And I do it by controlling my whip, which is why Kanban is so powerful. And Scrum; Scrum done correctly you're controlling your whip. It allows the team to enter into high performance in a natural path to prioritization done correctly.

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**32:47 KL:** Based on your discussion of what you meant by Flow and what you wanted the book to talk about, it felt very positive or affirmative like focus on what you are supposed to be achieving as opposed to the completion of tasks and things. And it made me immediately think of Turn the Ship Around and then I saw half way through the book you start referencing Turn the Ship Around by Marquet, which is a great book, right?

[chuckle]

**33:08 TK:** Marquet's book is awesome!

**33:09 KL:** Well, it's about everyone getting onboard with the vision and then go do that thing.

**33:15 TK:** Exactly. We also quote Brick by Brick, which is the story of the Lego turn around. They do the same thing, because in 2003 Lego was bankrupt.

**33:23 KL:** Yeah.

**33:25 TK:** And in a two year period of time with the new CEO who came out of McKinsey, from 2005 to 2011, while the rest of toy manufacturing was flat, one to one-and-a-half percent growth, and one to one-and-a-half percent profitability, Lego flipped! And started growing at 24% a year and 30% net profit through 2011 and two years ago became the largest toy company in the world. And every single thing that they did was agile and yet they don't mention the word one time in the book. It was short cycles, small batches, continuous improvement in short cycles and fusing the voice of the customer in the process, making the work visible and controlling the whip and reducing the footprint for innovation by narrowing the constraints and giving stronger boundaries.

**34:15 KL:** And that's the broad recommendation you would give to everyone in the leadership role, thinking along those meta-lines there would allow them to then figure out what they need to do in their own specific industry or specific organization?

**34:28 TK:** Yeah. And also from a leadership chair, I don't want to have 11 strategic initiatives. I want to narrow that focus down to a smaller subset, because we won't accomplish 11 things. You're bifurcating the effort of your leadership role at that point. What's working? What's not working? What can we change over the next week to get better as a team? We're not going to change four things, we're going to focus on one thing. And if it works, we implement it. We expand it. We improve it. And then we keep iterating through, now what do we do to get better? And so it's short cycle, continuous improvement and the teams love it because they see themselves entering into high performance and it's always more fun being a part of a high performance team.

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**35:21 KL:** Sounds like the prioritization function here is important, knowing which is the one thing that actually matters for what you're trying to do and understanding it enough to do that.

**35:29 TK:** And now you come back to leadership. Yeah.

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**35:37 KL:** One section in your book that I thought was also interesting and I thought you might want to reflect it for readers because they're going to want to go read this section is on anti-flow. What blocks flow besides just normal entropy?

[chuckle]

**35:51 TK:** Well, it really is... Anti-flow is anything that pulls you out of a state of high performance. And that's why we love Bob Sutton's book, *The No Asshole Rule*. Because we have toxic people that will absolutely kill flow. And so you have to identify those things that are aspects that will pull a team out of flow. And so, if I don't have a clear vision, what's going to happen? If it's not clearly defined, I can't get my team into high performance at that level because we're constantly bickering about, "No, no, no, let's go this direction. No, no, no, we're doing this." And you're spending time spinning wheels because you don't have the clarity and focus of the vision. And so not having a clear vision is an anti-pattern.

**36:41 TK:** You go back to turn the ship around with David Marquet. He didn't tell those people how to do their work. He didn't say, "Here are the right actions that you need to take." What he said was, "I trust you. I know you know the rules of the Navy. I know you know the safety requirements. We're a nuclear sub, there are engineering material laws we have to follow. You know what has to be done, you figure out how to get the work done." And he pushed the authority at how to get it done, the specific tactical delivery, down to the people doing the work. Let the team doing the work figure out how to do the work in the best possible way and let them excel into a state of high performance for themselves.

**37:27 KL:** But their training had to have happened before you can work with your people. So, it is about finding the right people. People have to be competent to the level that they're being asked to perform at.

**37:34 TK:** It's getting the right people on the bus and the right people in the right seats on the bus.

[music]

**37:44 KL:** There are so many other questions I have. I wanted to talk about proxy variables. I wanted to talk about your section on agile madness but I'm going to leave that to the readers to go and find. So, I really liked how you structured it. I felt like I was kind of pulled into it and then walked right through an obvious logic and then I separately got a chance to look at the examples so... And I was impressed. It has a lot of other books referenced and a lot of quotes. So, I think a lot of people could use it as the beginning of a resource library almost for the other things they could read from David Marquet to Aristotle, to Kotter, you've got them all in there. Kallman's, *Flow: Get Everyone Moving in the Right Direction... And Loving It*. It is that last tagline that makes all the difference, I think. It's the hearts and minds part.

**38:28 TK:** There you go. Exactly.

[music]

**38:33 KL:** So, if you want a high performing team, check out *Flow*. One of the great things about the flow framework is that it can be imposed on or integrated with just about any system. Agile,

Safe, Project Management and the Iron Triangle, you name it. Ted's book, Flow: Getting Everyone Moving in the Same Direction... And Loving It, is currently available on Kindle. Hard copies are due out in April 2018, wherever fine books are sold.

[music]

**39:05 KL:** Susan Schwartz is a PMP, an author, a board member of the Washington DC chapter of PMI and the founder of River Birch Group, which is dedicated to motivating cross-organizational project teams. She released her first book, Creating a Greater Whole: A Project Manager's Guide To Becoming a Leader in January 2018.

**39:24 Susan Schwartz:** What I really like to focus is on creating learning environments for project teams where people can build on each other's strengths. And so I like to think of my personal superpower as being a connector. And so what I like to do is help teams work towards making things as simple as possible so people's strengths and their own personal superpowers come to the forefront.

**39:52 KL:** So, that's an interesting comment right at the beginning. You look at it as individuals recognizing their own strengths, recognizing their own potentiality but you're immediately casting that as then the teams work better because of that. You're making the leap from the individual to the team. What causes that to happen?

**40:08 SS:** I believe Socrates said it initially, "The whole is greater than the sum of the parts." And that individually, we may all have... Do things very, very well but when we combine our efforts and some people might do one thing better than somebody else. If you can focus on one activity, somebody else can focus on another and you're doing them in sync so that your efforts build on each others. It's almost explosive when you're looking at it as productivity, even the title of the book was creating a greater whole.

[music]

**40:51 KL:** So, when referring to your book, Creating a Greater Whole: A Project Manager's Guide to Becoming a Leader, you're making a distinction between PM and leader?

**41:00 SS:** The difference to me between being a project manager and being a project leader is that you can't lead yourself, there have to be people. So leadership is not a solo sport. And just because you have a title doesn't mean you're a leader. Chris Hadfield was in charge of the International Space Station and he was the first Canadian astronaut. And as a training mission, they put him and his team on top of a mesa and said, "Get down, have fun." Well, he thought he was going to be the captain of the space station, so he started issuing orders. And all these people who were very talented, very experienced looked at him like, "What are you talking about?" And he had to realize that his job as the leader of that space station project and even as the leader of that getting off the mesa project is he had to listen to his team members, he had to work with them to facilitate the decisions they would make to achieve their mission, that just because his title was captain, didn't make him the boss of everybody.

[music]

**42:22 KL:** Now, the super power struck me as something that you were bringing based on your understanding of what you were writing?

**42:27 SS:** When you ask people, what is a leader? Very few people will give you a definition, they'll say "I know it when I see it." But they can't tell you what it is that they're seeing. So identify those four super powers, they are vulnerability, educated ignorance, mindfulness and emotional intelligence.

**42:55 KL:** We've heard of some of these words recently in the literature, probably in the last 20 years, a lot of mindfulness and emotional intelligence but take me through those first couple though. Vulnerability and the role of educated ignorance. Talk to me about those two.

**43:06 SS:** Vulnerability, I took from Brene Brown and her book *Daring Greatly* is one of my go-to, I suggest that all people starting their first leadership position, read that book. Her concept of vulnerability is recognizing your weaknesses. And if you understand where you need assistance, the key is not to brush over it and cover it up. How many times have we worked for managers who just sort of harrumph over things, that they don't want to be shown up. But vulnerability is where you realize where you might not be as strong as somebody else, there's nothing wrong with going to your other folks.

[music]

**44:04 SS:** One of the people I reference in the book is Sitting Bull. And what Sitting Bull did they didn't have the fire power that Custer had. And they were siloed, they were five different Sioux tribes.

**44:19 KL:** Right.

**44:20 SS:** And what he did is, he went to each of the four tribes and to the chiefs and said, "You are really good at getting weapons together, would you arm this United Front? Would you take the lead on that?" And he went to each person and said, "You're really good at this, would you take the lead for all of our five tribes." So, what he did is he recognized their strengths and they were skills, they did better than he did. When you can recognize where you're vulnerable, where somebody might be able to call you out. If you get somebody on your team that's really good at that, then you have time to focus on what you're really good at. And so that's what vulnerability is.

[music]

**45:15 KL:** What you have in your book is a table where you take your four super powers and you map it against the PMI talent triangle which is based on their discussion in the market about what is needed from project managers and I thought that was really, really interesting because you're looking at what they need to focus on, is how I was interpreting it.

**45:34 SS:** Exactly. And so vulnerability as a project manager, from a technical perspective, risk management is all about understanding your vulnerabilities. Because you need to know where you need to buffer things up, where you need to look for fixes, from the business management perspective, it might be knowing how to navigate that uncertainty, is it a 5% risk? Is it a 10% risk?

**46:04 KL:** What decisions do we make based on...

**46:05 SS:** Exactly what decisions. And then leadership comes back to what I just mentioned about, Sitting Bull and strategic humility, how do you get the people on your team focused on the right things and that's what a real leader really does.

[music]

**46:26 KL:** What did you mean by educated ignorance?

**46:28 SS:** I learned that term listening to a podcast, where two Jesuit priests, who were astronomers and one was the current astronomer for the Vatican and the other was a past astronomer for the Vatican. And the interviewer was commenting on how the Jesuits, their search for spirituality and she was asking does that conflict with science and your studies there? And their response was that both their spiritual search and their scientific search were based on this term educated ignorance. And so what that means is, you know so much about the topic, you know what you don't know. And so what a real leader does is they ask more questions than they answer, looking for a different perspective, a different point of view. Some innovative approach that wasn't part of their original thought process. And so that's where educated ignorance comes, is that you're always seeking.

[music]

**47:44 SS:** The difference between mindfulness and mindlessness, I go back to Ellen Langer who's a PhD from Harvard and she wanted to know the difference, what made a Harvard MBA successful versus not so successful. To get into Harvard you all have to have similar grades, you need similar academic résumés and what she realized after studying for two years, was that she called them mindful versus mindless managers. Mindless managers were the ones who took their lessons learned and just said, "This is what worked on the last project, this is what we're going to do on the next project." The mindful people were the ones that said, "This worked really well, this was a lesson learned however there's been a change and so we're going to adapt that lesson learnt to be a little bit different and we'll apply it in today's environment, not yesterday's environment." You're looking towards the future, creating some flexibility, some...

**49:01 KL:** Actually the requirements of change means that you need to pay attention to that, not just be kind of the rule-follower. So there's an adaptation that happens.

**49:07 SS:** Exactly And that's what mindful means.

[music]

**49:16 SS:** Knowing that you have areas to improve on, the educated ignorance, asking questions, knowing that you don't have all the answers, mindful being able to pay attention and that's what emotional intelligence is. When I first heard about Emotional Intelligence in the '90s, I was very much into technology. I was designing fiber optic networks. And my initial response to Daniel Goleman's book was, "Feelings? What do feelings have to do with anything?" Well, kick it forward 10 to 15 years and lots of life lessons and all of a sudden emotional intelligence is about engaging. In the most recent EQI 2.0 version, there were five areas of emotional intelligence.

**50:11 KL:** You got your self awareness, independence, interpersonal relationships, empathy and flexibility. How do you see people understanding their emotional intelligence in this context?

**50:18 SS:** Well, looking at those same five areas, the self awareness is how you view yourself and the world views you. The next part about self awareness is self expression. How well do you say what you're thinking? And then the third one is interdependence. That's how well you play with others. And then you mentioned flexibility and stress tolerance. The interesting part to me about emotional intelligence is, as you mature, your emotional intelligence, your engagement increases. You just... It's called wisdom.

[music]

**51:08 KL:** You seem to be making something of an efficiency argument, conflict happens and the faster you get your team over it, the more quickly you're moving all towards the same target. So, it was really an efficiency question you were asking, you're saying like, "Guys, deal with it. It's going to happen." Am I interpreting that correctly?

**51:24 SS:** Conflict can be very, very good. Because it brings different perspectives and different ideas. But if you don't handle it constructively, you can just waste so much time and in today's world where we get in to matrix teams and my definition of a matrix team is when you have all of the responsibility and none of the authority. You have to convince other people from other experiences, other silos, other reporting structures that they want to work with you on this project team. And there really may be a better faster way to do something but unless you make a safe space for people to have those conversations and to learn how, in practice, how to disagree with one another and to do it respectfully, then you're just going to lose all this time because people will just go back into their silos and then you get back to the Hatfields and the McCoys and marketing won't talk to engineering.

[music]

**52:40 KL:** So you reflect on Cutler's works on the ethics of good power. You talked a little bit about the power paradox. What is the power paradox?

**52:48 SS:** There has been a scientific study that showed that when people, for lack of a better word, got keys to the executive washroom and they were promoted into the executive suite, all of that good collaborative leadership that they practiced, that got a good following, that got people supporting them, saying that they'd follow these people anywhere, all of a sudden it went out of the window.

**53:15 KL:** Why? Because what got them there should have been what made them successful.

**53:19 SS:** Exactly. But once they got the keys, then they felt that they were exceptional people. And that's why it goes back to gratitude and remembering how you got there and that getting to that C-suite, you have responsibilities and essentially the responsibilities of a leader is to help those who are working with them achieve objectives that they didn't believe they could do on their own.

[music]

**53:53 KL:** In the end there's a certain level of decision making that they need to make as well. You talked about keeping people focused on what's important, getting rid of the things that are not important. And that took us to the Alpha Male Syndrome.

**54:07 SS:** Yes. Wasn't that great?

**54:08 KL:** And I wanted to dig into that a little bit because you have a nice table about the syndrome and how that's expressed and how we should watch and avoid, and I thought it was very, very interesting. So do you want to talk a little bit about the syndrome and why did you want to include it?

**54:23 SS:** It's interesting how we take different perspectives. The book I was referencing compared alpha and beta leaders. And it talked about the difference because in many of our perspectives, and many of us who grew up in business in the 90's, think about really strong, hard charging leaders. And it was always that you had to be an alpha leader, you were sort of a command and control person. Whereas a beta leader is more of a collaborator. And so a beta leader gets folks together, they try to get people to have multiple view points, find the right answer. And so what really came out of that text for me that was fascinating was that it showed that both types of leaders are important and that their skill sets can be used in different situations.

**55:19 SS:** For example, if you are caught in the heat of battle, you do not need somebody to say, "You know what, what do you think about this, Sergeant?" You need somebody to be command and control and make a decision. And then there are other times where you need someone to really bring the forces together and be the B type of manager, it's not a bad manager. B managers are collaborative, they can be very effective. And if we look at stereotypes, collaborative managers have been excluded from the C-Suite because it was just assumed that you had to be an A-type personality to head up to the C-Suite.

**56:01 KL:** Well, or that's how they were successful and got the washroom keys and then they changed.

[laughter]

**56:06 SS:** And that's true.

**56:08 KL:** How do we get these attributes? Or what causes us to learn these?

**56:15 SS:** I really believe that it is modelled behavior. And that's one of the reasons why I wrote this book.

**56:21 KL:** So that's what I wanted to ask you here near at the end, is what made you write this book?

**56:26 SS:** Honest and truly, I started writing it for my nieces and nephews who are in their early 30's. And I was watching them take on strategic roles after being very good tactical, operational managers. And I remembered being in my early 30's and being handed a strategic position on a Friday and said, "Guess what, you're promoted." And I left corporate headquarters in St. Louis and I got to the airport and I picked up this book and it's kind of embarrassing to say today, but it was The

Professional Woman's Guide to Becoming a Leader. But my key takeaway was by the end of that two-hour airplane ride, I realized that I was starting out a little more ahead of the game. And I started realizing that when these technical people get promoted, they're modeling management, leadership behavior of the technical people who were promoted before them. And because folks with a budget said, "Leadership, ugh, that's just a soft skill, anybody can figure that out." Nobody did, so you're just modeling more and more bad behavior.

**57:40 KL:** So you were thinking about giving them some insight of your experience?

**57:43 SS:** Exactly.

[music]

**57:46 KL:** So PMs, to be a successful project manager, you have to do more than manage, you have to lead. That means listening, drawing on the strengths of your team members, give them space to voice their opinions and suggest alternative approaches. Remember, beta leaders can be just as effective as alpha leaders. You can find Susan's book, Creating a Greater Whole: A Project Manager's Guide to Becoming a Leader, on Amazon or at [crcpress.com](http://crcpress.com).

I heartily and genuinely recommend these three books. Each one provides interesting insights and inspires thoughtful conversation, as you may have noticed, about project management and leadership.

**58:24 KL:** Special thanks to my guest Michael O'Brochta, How to Get Executives to Act for Project Success, Ted Kallman, Flow: Getting Everyone Moving in the Same Direction... And Loving It, and Susan Schwartz, Creating a Greater Whole: A Project Manager's Guide to Becoming a Leader. And remember, for more on leadership and project management check out the University of Maryland's PM Symposium on May 10th and 11th, 2018.

**58:48 Announcer:** Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles and Hiroaki Honshuku. Post production performed at M Powered Strategies.

**59:04 KL:** PMPs who have listened to this complete podcast may submit a PDU claim for one PDU in the talent triangle leadership, with the Project Management Institute CCR system, use provider code 4634 and the title PMPOV-0048, New Releases: Conversations with the Authors. Visit our Facebook page, PM Point of View, to comment and to find links to more episodes. There you will also find the links to our transcripts of all one-hour productions. You can also leave a comment on [projectmanagement.com](http://projectmanagement.com), evaluate us on iTunes and of course you can contact me directly on LinkedIn. I'm your host, Kendall Lot and until next time, read a book, keep it in scope and get it done.

**59:49 Announcer:** This has been a Final Milestone Production sponsored by Empowered Strategies.