

Smith, Stenbeck, Pritchard

58. VOE I: Working at the Macro Level

00:01 John Stenbeck: When the leaders change direction every 30 days, every 60 days, every 90 days, nobody can keep up, everybody gives up.

00:11 Carl Pritchard: BLUF. Bottom Line Up Front. If you don't hit the bottom line up front, you've toasted your opportunity to really communicate to those up the food chain more effectively.

00:23 Dr. Kenneth Smith: In traditional project management, planners plan, executers execute and evaluators evaluate, if ever. And there's three independent silos.

00:36 CP: The American cultural tolerance for silence is 15 seconds.

00:41 Kendall Lott: That's a long time.

00:43 CP: Oh.

00:43 KL: Actually, I freak out at six seconds on these interviews.

[music]

00:49 KL: Welcome to 2019 and a new series for a new year. Today I give you the first, and what I hope will be an enlightening series of episodes, called, VOE, Voices of Experience. Where I talk to seasoned leaders to get their insights and observations in the world of Project Management. In this episode one common thread that I discovered is a holistic all-encompassing macro level perspective. It's important to not only keep the bigger picture in mind, the organization and the intended benefits of the project, for example, but also to keep the lines of communication open across the various levels, vertical and horizontal, of the organization. In this episode you will hear from Dr. Kenneth Smith on techniques and tools, then John Stenbeck will talk about how to apply Agile at scale, at the portfolio and organizational levels, and I'm happy to have Carl Pritchard back with us, this time with some handy tips on how PMs can best communicate up the chain of command.

01:46 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 of the angles. Here is your host, Kendall Lott.

02:00 KL: Project management practitioner, researcher, evaluator, consultant, instructor and author. Ken Smith has been working in project management since 1960. Five decades. He started out as a PM intern in the Navy. Then went on to a long career at USAID, managing projects and portfolios in a range of sectors: agriculture, health, engineering, water and more. He happened to be in Manila running a series of trainings for the Philippines chapter of PMI when I caught him on Skype. In

light of his 50 years in this profession, I started with wanting to know how Project Management had changed and how perceptions of it had changed.

02:37 KS: People are much more aware of it, it's much more sophisticated. There are standardized tools that are generally used, though not all of them as well as they should be. One of the things I've found is, with the software a lot of people jump to the software. So they use the software, but they don't know how it works. And one of the things I do in my seminars is make people go back to the manual paperwork where they'd create a critical path chart with post-it notes, put time estimates on it, learn how to calculate it. And then the light bulb comes on of why a critical path is a critical path.

03:20 KL: So there you go. It's not just knowing how the software works, it's really about what is the underlying theory that makes the software meaningful as a tool.

03:29 KS: One of the other things that I've seen with the tools is that because the capability is there in the software now, executives tend to micromanage because they can drill down to the details. So they tend to micromanage by having that facility to drill down. Whereas in the old days, I'd present a critical path chart and that was it. [chuckle]

03:55 KL: Oh, wow, I had not even thought of that. So two warnings with the development and maturation of our project management environment, PMs. One is, it's not enough just to use the tool, there is some level of understanding of our theory underneath this that's very important because that's what helps you manage. And the other one is, be aware that your bosses, the executives now may actually learn the tool which gives them the opportunity to micromanage. You know, if you have data available, there's always somebody that will use it. If you expose it, somebody wants to know about it.

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04:28 KL: Have you found other areas where there's been maturation, maybe even some tool development, and people may not have yet learned enough of the theory underlying it? Critical path has been a big one, of course.

04:41 KS: Well, one appreciated critical path that was out of the Gantt Chart was Line of Balance, which was developed way back in World War II for repetitive type project scheduling.

04:54 KL: I've never heard of this.

04:56 KS: For instance, in a housing project, building one house, you would do with critical path. Building 100 of the same houses, you use the same model and Line of Balance is made to order for that. And I've used it in many different situations for any type of repetitive type process. And although the theory is there, there is no software like Microsoft Project or Primavera and there are only dedicated in-house unique developments. And I found that most people aren't even aware of Line of Balance.

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05:42 KL: One of your big hooks is this idea of praxis. Praxis is related to the word practical, practicum and all these words. But it's about taking a theory and then using it in terms of the applied

nature, in terms of a practice. So Line of Balance is a great idea. Can you tell us something about the nature of this theory and then how it's applied, why it matters?

06:02 KS: Well, you take critical path and if you're going to repeat the process, what you need is a cumulative critical path. And there's a fairly simple process, you find the longest single activity on the critical path, you find the beginning of the project process to the start of that activity, which we call the lag time, and then we go from the end of that longest activity to the end of the process, which is the lead time. And it's a simple formula that you can calculate how many repetitions you can do in a given time or how long it would take to produce a number of repetitions. You're saving in time because you can do things so much faster. So you don't have any additional indirect cost for the additional period and it's very efficient because you don't have people standing around when they don't need to be there and you can schedule and focus on where the critical points are. I'd say it's a cumulative critical path in effect. So the schedulers can group the preceding activities together or spread them out depending upon the availability of personnel. Which is very important these days because Project Managers don't manage their own people like they used to. They are borrowing them from different functional silos and everybody seems to be spread out on multiple projects instead of being dedicated to one particular project.

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07:44 KL: In the past you saw Project Managers as directly managing teams and now you're seeing it much more in these matrixed organizations or weak matrix.

07:53 KS: Yeah, in the old days, the Project Manager was all powerful. And these days, I talk to people, particularly on consulting, or when people come in to my seminars. I ask them how many projects are they working on and how many projects are they managing. And the managers usually tell me they have about half a dozen projects and the individuals tell me they are usually assigned out as a specialist on half a dozen projects at the same time.

08:21 KL: How do you see that changing the role or the execution that project managers have to undertake?

08:30 KS: The project manager now has to get away from, as much as possible, get away from their technical specialty and be an HR-type person. People can work for you or with you or they can avoid you if they don't like you in this kind of matrix. And now the Project Manager's got to be much more empathetic with the team. But you really have to find ways to create your team that wants to work with you.

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09:05 KL: So you wrote a book, Praxis, I guess, is the title. Tell us about the book and tell us what it's about and what caused you to write it.

09:13 KS: Okay. It's called Project Management Praxis and working in different environments and using the standard tools, the critical path, bar charts, the line of balance, the logical framework, which was what the international community used for summarizing, and then earned value. All these tools, I found that they weren't always very well explained and weren't always well-understood. So the first half, I cover these standard tools and how to use them and some innovations

that I've developed. I also developed a lot of templates. I know a lot of people don't like to crunch numbers and do stuff so I created a lot of Excel templates. So you just put in your numbers and it does the crunching and gives you some estimates and projections for it.

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10:20 KS: The other half of the book is on evaluation. Which is not really a project manager's responsibility, but it relates to the strategic, the end-objective beyond the project. And Project Managers should be aware of it even if they don't do it because their project was supposed to result in accomplishing some of these objectives. And we found in USAID a lot of successful project deliveries, that the out... What we call the output level. We have a road, but then we find there's nobody using it or maintaining it. We have irrigation systems that don't irrigate. We find that there are lots of situations where the project is delivered, but the beneficiaries don't get the benefit out of it that was planned. People should think, during the planning stage, how to evaluate the project as well as just delivering the end product.

11:22 KL: That's how I got to you, it was through actually our discussion with Charles Chandler on the issues about becoming an effective organization, and having organizational effectiveness, ultimately is more than outputs. In fact we can think of that, outputs are actually controlled internally, Project Managers produce them on behalf of something the organization has structured. It's about getting to outcomes and outcomes have to do with use, adoption and uptake. So is this part of that logical framework you talked about?

11:46 KS: Yeah, that's what the whole LogFrame structure does. It ties the project to the strategic objectives and if you are building a road, who's going to use the road, what do you expect to travel, what are your base lines and as a result of that, what will be the economic development that goes beyond that? And we've applied this I'd say across the board in different sectors and it's just a fantastic tool. This is another area that I wish PMI would pick up and include in its PMBOK. In my courses with PMI, I do teach it to the participants. They say, you start with your LogFrame, what are your strategic objectives? So that's where your projects come from, what are the projects to support those objectives? And then the Project Manager takes over to design the project through the five different stages and the sixth stage then is evaluation to see whether it actually attained it.

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12:51 KL: I think one of the things that's been a theme for these years of podcasting we've done has been that projects have to produce value. And we get that and we've been highlighting it, but I think there's an interesting tension in here and I'd like to hear your thinking on this, it's to why it may not have been included in PMBOK. The evaluation as established in PMBOK, as you stated, is really about scope, verification and validation. Right? It's checking whether or not you did what you said you would plan and it's the product or the output, the thing that you said you would produce and has the qualities that you had been assigned going in.

13:24 KS: Exactly.

13:25 KL: And one of the questions we have is, is it useful for something? Project Managers, strictly speaking, stop...

13:31 KS: Stop.

13:32 KL: When it goes to project... Yeah, it stops. Right? A project is something that has a definitive end. And you're talking about its user uptake.

13:38 KS: It's the sponsor's responsibility. They wanted the project so it's their responsibility to see that it actually works. A classic I saw was the... I guess it was in East Africa, they were providing mosquito nets to help people avoid malaria, from getting bitten by mosquitoes. And all the mosquito nets were delivered, but when they went to evaluate they found that the incidence of malaria was just the same, but when they got on the job, they found that instead of using the mosquito nets to keep mosquitoes away, the local people had found that they could use them for fishing. And so they were using them as fishing nets and since they were DDT impregnated, they were just polluting the water as well.

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14:35 KL: I'm wondering if the Project Managers have specific and particular insight that would be helpful for the stakeholder or executive layer, if it's inside a company. When the company says, "Now, am I getting value out of this project? The project is done, I have my product. Am I going to get value?" Right? Is there some sort of insight that allows that to be the interface between the project manager at release to the larger owner of the strategic issue, the value requirement? Is that maybe something that they have insight into that makes that an important part of a project manager's job.

15:14 KS: Yes, but in my experience and my observation, people that plan the projects don't manage them and people that manage the projects aren't usually in on the planning. In fact, particularly in the government, the government deliberately farms out the planning, the pre-feasibility study to one company and then that company is precluded from bidding on the next job because they have unfair advantage. So another contractor gets to do the job and they haven't talked to each other. And then the project manager usually gets hired way down, two or three years later, to implement the project. The information should be carried forward and this is one of the things the LogFrame does, but I don't see it really being face-to-face contact with people sitting down and meeting and threshing it all out. It just seems to be passed on from one to the other in documents that may or may not be studied or read or understood until you actually get on the ground. I think under the Agile approach with the software, there's a much closer relationship between the sponsor and the designers. So I think they are getting together much better on that. But traditional project management, planners plan, executers execute and evaluators evaluate, if ever. And there's three independent silos.

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16:51 KL: We talk about the need to see our projects as investments and providing value and I think the Logical Framework is important as one example of a tool that actually connects the questions of... At a plan stage and then later for evaluation. Of why are we doing this project? Now you have the project, did it run well, does it produce what it needs to and then is the output valuable? It's the mechanism that connects the question of value to the execution and completion of the project. So the news to the PMs to me seems to be, it's one thing to understand that your project is really an investment and has value and it's another thing to participate in some sort of mechanism

that actually links it though.

17:36 KS: Yeah.

17:37 KL: So there you go, PMs, logical framework. Probably something worth googling and starting to look at.

17:43 KS: I've got a chapter in my book on the LogFrame. So that's probably the best place to look for it.

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17:51 KL: The beauty and really the necessity of Logical Framework is that it connects the project to the overall strategy of the organization. Using this tool from the planning stage onward forces you to keep the desired objectives and benefits in your sights and adjust as needed. You might want to listen to PM Point of View episode number 57 on organizational effectiveness with Charles Chandler where we discuss these issues in more depth. You can find Ken's book, Project Management Praxis, a treasure trove of practical innovations to classic tools and techniques, on Amazon.

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18:31 JS: I'm John Stenbeck and I'm a pragmatic Agilist. I'm interested in Agile, on bigger programs and projects and scaling up and that kind of stuff.

18:42 KL: That's my next guest. Best-selling author, speaker and President and founder of GR8 PM pronounced Great PM. John Stenbeck is interested in building a strong discipline with increasing effectiveness of PMs. He's a long-time active PMI volunteer and has written extensively on Agile: The Agile Almanac Book 1, Agile Almanac Book 2 and Agile Government Contracting. His latest book is about Agile in healthcare. Today he gets practical and challenges us to reflect on some long-standing concepts about Agile. Scale changes everything and it ends up being how networked or connected you are as a PM.

KS: Your background seems to be around Agile, but also about developing professionals. It really seems that you're trying to drive their ability to be effective using tools such as this.

19:29 JS: In today's marketplace, the truth is, everybody's had their expectations impacted, influenced, groomed, if you will, by the impact of... By Facebook, by Google and by Amazon. So you have the Google-Amazon-Facebook effect and that means leadership has to be different. The old status quo. The idea that there was a state of equilibrium more or less, which is what all of our economic models were based on, all of our schools of economy were teaching based on, no longer applies. Disruption is now the rule and the only way a leader's going to survive in an environment where there's a lot of disruption going on, is if they understand that Facebook-Amazon-Google effect and if they understand, at least at the kind of the core planning higher levels, what they have to do to create an environment that will facilitate teams that can be innovative, creative and responsive.

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20:34 KL: So we've got this requirement for leadership in the modern world and I want to link this back to how you've seen the development of Agile and its uses. The ability to do Agile at scale, that's the interesting beginning to start this progress. Tell me a little bit about that.

20:46 JS: And that's really where the frontier is now. Because organizations understand that Agile works at the team level, it's now how do I scale it to my teams, how do I... I'm not going to co-locate somebody from Sweden with somebody from Delaware with somebody from Rio de Janeiro. It won't work that way. So how are we going to scale that? And also then, if we're doing a multi-billion dollar program and I need to have financial reporting and I need to have resource management, which none of the original Agile frameworks had anything to deal with. So scaled Agile framework, safe, developed, a large-scaled scrum, disciplined Agile. And what they share in common is, it's back to business school. It's granularity. The PMBOK guide that many of your listeners may be familiar with from their PMI background.

21:40 KL: They better be.

21:42 JS: They better be, right? And it talks about rough order of magnitude and decompose it into budgetary and decompose those into definitive kinds of estimates. So there's levels of granularity. Well, if you're going to plan for Agile... And, funny thing, a lot of people hear Agile or a lot of Agilists say, "I do Agile, so I don't do planning." And nothing could be farther from the truth. The truth is Agile has more overhead than traditional Project Management. Yeah, I love the look. I wish your listeners could see the look on your face.

22:12 KL: Look at my face being in shock and awe.

22:14 JS: Yeah, right?

22:15 KL: That's not what most people lead with when they're Agilista. What do you mean by that? You have to explain that.

22:19 JS: Right, yeah. And I think that's why I get invited to speak to senior leaders at these organizations.

22:22 KL: To defend your position.

22:24 JS: No, it's because it makes natural sense to them. They're not interested in somebody saying, "Hey, we're going to manage your organization from now on but with no budgets and no plans." We're not going to know what our resources are doing. That's just hogwash.

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22:44 KL: We're talking about leadership in the modern era, having to figure out how to handle some of the requirements of a modern business cycle. And you're talking about multi-national Agile at scale. So what is it that they need to know to make that work?

22:57 JS: To make that work what they need to know is that the senior level managers need to be planning and managing and thinking about ROM level, to use the PMBOK term, ROM level

granularity.

23:10 KL: Rough order of magnitude.

23:10 JS: Right. Yeah. Or to use an Agile term, the road map level of granularity, which means big boulders.

23:16 KL: Yeah.

23:17 JS: And longer time frames. And the hardest part of that for the real leader is that they have to deal with the unavoidable non-linear distortion that time causes and that size causes. So they have to get comfortable with the fact, you can't give them detailed down in the weeds answers for something that we're not going to build for two years. Too much of what they'll want or the direction they want the organization to go, will change. But we need to have those bigger pieces in place so that now the next level below that, your middle level managers have some objectives, they have some vision, they know kind of where they're going. And they need to then decompose those ROM, that rough order of magnitude, those boulders, down into more manageable features or functions or capabilities that teams can then decompose and build.

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24:13 KL: Just today, as I was coming to drive to meet you, I saw a Harvard Business Review article talking about the issue of Agile and organizations and where Agile projects have failed and it's related to seeing that fundamentally from a leadership perspective, there's a formal organization that ends up crushing the Agile team as soon as you start talking about at scale, essentially. That the problem is, is you need teams that have to work together. It's fundamental to Agile. Right?

24:44 JS: Yes.

24:45 KL: And the formal organization silos them. So you can do it at localized projects, but when you start getting up into the enterprise level, the problem is, is the formal structure, even when they know Agile, even when they know what they want, how they're going to do it and they have experts driving it, the formal organization ends up crushing them. So they looked into why does that happen? And they found that the real issue, because it's about collaboration, is about networks. And they're finding that there's only 3 to 5% of an organization that has people that are high networkers.

25:14 JS: And Dan Pink...

25:15 KL: Yeah.

25:15 JS: Who you're familiar with obviously and many of your listeners will be. And his most recent book is called, WHEN. And one of the things he talks about is that, that for teams to function we have to synchronize. We have to synchronize at the environmental level. And I'm using a little different terminology than him.

25:33 KL: Sure.

25:33 JS: I need that alignment to the organization to feel some power, if you will. Then I need to

align, I need to be connected, I need to synchronize with my team. So there's a sense of commitment to each other to getting this done. And then I need that synchronization to internalize with me. And so when you talk multinational, when you talk crossing geo-physical geo-political borders and language borders. It gets very, very complex for how you do that.

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26:14 KL: Connect this for me, you referred to it as, we have to look at Agile technique, but looking at big boulders as the level of granularity.

26:19 JS: Yes.

26:20 KL: And now mapping it to the idea that it's really about the complexity of the organization's design and the need to find the more hidden infrastructure, how people really connect.

26:30 JS: The senior leaders have to be willing to communicate with clarity about what it is they want to see in the way of the big boulders on the longer term. They have to communicate that vision with some stability. When the leaders change direction every 30 days, every 60 days, every 90 days, nobody can keep up, everybody gives up. And there isn't the opportunity for that social network, that synchronization to start to happen. And I really like the insight that you provided of, there's only a small percentage of folks who do it naturally, do it instinctively. Right? And so, in my thinking, this is the next step beyond EQ.

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27:20 JS: The book I'm currently working on is Agile in Healthcare. Where there truly are life and death consequences.

27:29 KL: Well, let's go there.

27:30 JS: And there are tens of thousands of people involved.

27:32 KL: You're talking about healthcare in terms of development of services, products, delivery? In what capacity?

27:36 JS: I've been specifically working with leadership at two big healthcare systems. They own hospitals, lots of doctor... Physician practices, that kind of stuff. So multiple tens of thousands of employees, over a million patients that they serve every year for each of these organizations...

27:56 KL: So where's the Agile play?

27:57 JS: What they have discovered... And just a second ago we were talking about, the marketplace is no longer in equilibrium. And there's so much complexity at the system level when we think of technical systems. But there's also so much complexity now in the relationships level because of who's actually providing the care to the patient. Doctors are seeing a lot more patients in a lot tighter timeframes, with a lot more demand, they need better information systems, technical support. They need better communication, interactions with the nurses, the pharmacists and all of the other professionals who are working in this environment. All focused on, how do we most

effectively care for the patient so that it's most affordable, not only for the patient, but for the whole system, the whole nation?

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28:53 KL: I'm trying to make sure that I understand Agile in the context that it is a development process. So what is it that this approach will drive some sort of transformation? In raising a point?

29:04 JS: It is a development approach. I think the doctor of the future has to have the mindset of being completely comfortable with systemic change occurring around them, constantly. Doctors who graduated from medical school 10 years ago or 20 years ago thought, I'm going to have a practice and I'm going to have nurses and I'm going to have billing cycles and all of this other stuff and I'm going to play golf on Wednesdays. And it's no longer like that now. And the two hospital systems that we're featuring as in-depth case studies in the book, the people who were a part of the team decision-making involved with the transformation. And it really was a transformation of culture, transformation of how we see and think about the patient, a transformation of how doctors think about who they are, what they do, how they have to interact and what systems kinds of support they need. And so when you're in an environment of high complexity or high uncertainty there's the potential that Agile's going to help because we're seeing it beyond being a development methodology and we're now seeing it as a competitive approach to the marketplace. Either I'm competing just to survive or I want to use it to compete so I can thrive so I can do even better. And that means it now becomes this whole transformational thing.

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30:33 JS: Leaders have to be more focused and more disciplined and willing to restrain how much change they're asking for so that the rest of the organization has the ability to respond to it and provide active feedback. We coach our clients, actionable insight. If you as the CEO say, "I want to enter this new marketplace. I want to do this particular new service or product." Then I need to know what's the leading edge of that, what's the minimum viable thing that I could deliver to measure market reaction.

31:10 KL: So one of the concepts of the minimally viable product is, what you're saying, we need to take out of the development concept in a certain sense and apply at these larger scales at the organizational level and around things, particularly in healthcare. Because that's what I was wondering is, so you've described the requirement from a business perspective to be more competitive, to be more persistent into the future. But what are those elements that you're consulting people to see in Agile at teams, in a development level, that they have to pull up... In healthcare, we can keep it in healthcare to go forward. What are some of the examples?

31:45 JS: Just a really interesting discussion with Jeff Rudisill, who's the PMO Director at Centra Health. And he said, the thing that drove them to Agile was...because they were very successful traditional Project Management approach... And the thing that drove them to Agile was, the traditional approach could deliver successfully, it just couldn't deliver quickly enough. And what Agile can help you do, is I can develop a first step, a first stage, a first implementation of something. And then when the user experiences it, they have the "aha" moment and they go, "Wait a minute. I thought I needed this. That's not actually what I need, it's this other thing I need." To tie this back into what does this mean to Senior Management? Senior Management needs to get

feedback that says, "Oh, if we continue in that direction, there will be a market space opportunity." Or, "What you're really trying to envision is not doable yet."

32:44 KL: So, minimally viable product and rapid feedback are two characteristics that we need to pull out.

32:48 JS: Very important. Yes.

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32:54 JS: The thing that needs to mature in the Agile space is the ability to talk about budgets, which that just sounds crazy, right? But when you have a lot of resources and a lot of things moving forward, how do we track whether we're making appropriate amount of progress for the amount of investment.

33:16 KL: Well, what's your recommendation? What do you consult to them? Tell them to look at?

33:19 JS: So again, this is going to make...

33:20 KL: How do they approach it?

33:20 JS: This is going to make a lot of your PMI audience just groan badly. But earned value management. We don't need all of the bells and whistles of earned value management, right? I don't need all 780 pages...

33:32 KL: That requires a real knowledge of your scope and schedule locked together and Agile seems to want to challenge that, doesn't it?

33:38 JS: What's interesting, and a lot of people look past this, earned value management and Agile share a really important core principle.

33:48 KL: Tell me. [chuckle]

33:50 JS: Yeah. The work is done or not done in Agile and it has earned value or it has not earned value in earned value management. If you apply earned value management wherever you're using Agile and you apply it at the reporting-level at the end of the iteration, there is almost no additional overhead to get really good accounting and budgetary information. Because at the end of the iteration, it's done or it's not done. And we can identify the value of the features that are done versus the value of the features that are not done. And that'll line up right with earned value management, almost no added overhead to get great budget.

34:32 KL: That actually almost seems like it's exactly the same. One of the interesting things to me though is, in earned value management, as I remember it, there is an implied end of schedule that you're looking to mark against. And in Agile, while I know that we're not saying there's no schedule, you're not benchmarking it against schedule, you're not worried about schedule in the same way. Am I missing something there?

34:54 JS: But every iteration is a unit of schedule.

34:57 KL: So you just measure it against that.

34:58 JS: And things either got done or not done. And the truth is, if you're a serious practitioner of Agile with some real expertise, you're creating release plans and road maps, which is this program and portfolio.

35:12 KL: You're still going to see it.

35:13 JS: And you still have that. Right? As much as a lot of the Agile boots in the field want to say, "No, no, no, I don't have a schedule." No, the release plan is a schedule, the roadmap is a schedule. Absolutely, there are some dates and timing. Now, will we adjust what content is delivered by those dates? Yeah. If learning and discovery provides actionable insight that we informed the leaders with and they now want to adjust. See how this... It's the feedback loop. It's the communication, it's the social network that you started this with. Right?

35:47 KL: So we're back to the network side. Yeah, I know.

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35:54 JS: I was just recently... I heard somebody refer to middle management as the cement layer so that no communication from below ever goes up and no communication from above ever goes down. And so the social networking component, that cement layer has to become an active layer, it has to become part of the communication mechanism and that feedback's going to have to happen.

36:19 KL: And that's what Agile taught us. Is that, get enough done, get that feedback. Now we even... You were talking about having the tools to measure cost so we can actually understand schedule. All those things are real still and we can do those at a larger scale and across teams. And the key that makes it work at a larger level... Implied in a team was that they're working together.

36:38 JS: Yes.

36:38 KL: It's the social context or the networking... The ability to be collaborative across a formally defined organization and that's what gets hard at the organizational level.

36:47 JS: And if we think of the overlapping circles of a Venn Diagram. The circle, that's the executive communication. That circle, it's going to have to overlap with middle management and middle management circle's going to have to overlap with development level or team level and there's going to have to be that bigger sense of the bigger team so that communication flows more effectively.

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37:17 JS: In the Agile space we talk about an environment of personal safety. An environment where I can say, "Wait a minute, there's a huge risk." Or, "I see this problem." Or, "I see this..." Transparency is an absolute fundamental requirement for an environment of learning and discovery and I don't want learning and discovery to occur at my expense.

37:39 KL: So there we go. There's an Agile characteristic we should bring forward.

37:42 JS: Right. And so the social network has to be one where it's okay to be transparent about errors or mistakes and see them as learning opportunities and know that it won't cost me my job. Right? The reason the two organizations that we are highlighting as case studies, a big part of the reason they were so successful is, their relationship with their vendor was a relationship of a true team, of a true partnership. When the chips were down, they stayed a team instead of pointing fingers and filing law suits and they worked through it in the learning and discovery and got out of that together. How much of the dirty laundry they're willing to share? Because it's hard.

38:22 KL: Back to the trust problem.

38:23 JS: Yeah. And really what I'm asking them to do, is to be transparent for the benefit of everybody else, even though it may have very little benefit to them directly. But my sense is that these particular leaders are so unique, have such a commitment to not only their organizations, but to helping healthcare, that I think they're going to be willing to do that.

[music]

38:49 KL: So using a scaled Agile framework for large complex organizations requires trust and transparency that comes from the top down. A fast feedback loop must be established where openness and a fault-free approach prevail. John's new book, *Enterprise Agility in Healthcare: Candid Case Studies of Successful Organizational Transformations* is available on Amazon Kindle as are many of his other books. I recommend that you give them a read. And for those of you that haven't read it, Daniel Pink's book, *Drive: The Surprising Truth About What Motivates Us*, is a must read for some innovative thinking about how you can work with teams.

[music]

39:38 KL: Some of you may remember Carl Pritchard from the episode number 52. He was the risk guy for our round table discussion on risk and how it's addressed in the PMBOK 6th edition. Carl is the Principal and founder of Pritchard Management Associates and a recognized lecturer, researcher, instructor and author. For the past few years, he's been doing a presentation on, *Communicating Up: How Project Managers Can Be More Effective if They Can Share Their Boots-on-the-Ground Insights with Their Managers and Executives*. What I liked about this interview is that as much as he's sharing about how PMs should talk with leaders, it's also about how leaders should interact and listen to their PMs.

40:17 KL: What has caused you to investigate and want to write about *Communicating Up*? The project manager sitting in that layer where there's executives above them.

40:23 CP: One of my clients came to me and said, "We are getting feedback, over and over and over again, from the executive tier of the organization where they are coming back and saying, your people aren't sharing what we need to know. When they come in here, they don't seem to have all the ducks in a row." And the real capture out of it, the thing I want people to walk out with, is recognition that, for one, executives have expectations. When you are talking to people up the food chain, the one expectation is, you're not going to waste my time. If you communicate that from moment one, you've won a heart, you really have. You've got people who are actually buying into

the notion, "Oh, he's bringing some value, he's actually doing something righteous." If, by contrast, you set it up like a story, an elaborate mystery where, "I'm going to tell you something, but wait, I'm going to run through 27 slides to get there." You have just tormented some poor soul and made his life, or her life, a living heck.

41:26 KL: Is it the function of the value of what you're providing or the time management around what you're providing?

41:32 CP: Yes.

41:33 KL: Both?

41:33 CP: Yeah, it is both. And the military have a term for this, it's called BLUF, Bottom Line Up Front.

41:40 DS: Yup.

41:40 CP: And if you don't hit the bottom line up front, you've toasted your opportunity to really communicate to those up the food chain more effectively.

[music]

41:55 KL: Do you think that's inherent in Project Management or the way we're selected, the way we're trained? What's making them want to do the run-up to get to the punch line?

42:02 CP: I think it's a function of, so many project managers for so long have been just pummeled. They've just been beaten up because you'll go in and you'll say, "I need another \$100,000."

42:14 KL: That's bottom line up front! [chuckle]

42:17 CP: And when they tried doing BLUF, when they tried doing bottom line up front, they wound up with that kind of a, "You want what? There's no way in God's green Earth that I'm going to give you another \$100,000." And they get beat up for it. And so they feel like, "I didn't have a chance to explain myself." And so what they felt was necessary to do to heal that was to do the whole run-up, which is an enormous mistake because what they should be doing instead...

42:44 KL: Here we go.

42:45 CP: Is saying, "Here's the benefit. Here's what I need for that benefit." To actually come to pass.

42:52 KL: So we need to start with benefits. So they were back to the value of the project, the value of this new request in the project, this new explanation, what's going on and why that's beneficial? So have you had a problem trying to get that across to project managers? Have you seen evidence of them not coming out with the goodness of what I'm about to tell you about?

43:09 CP: Yes. And it's funny because we do little demo presentations during the class and what I find kind of amusing is, some of them will get up and say, "Well, what I really want to talk to you

about today is, I think it's really important that you understand." And everything they're saying is, "I want to communicate to you. I really, really want to communicate to you." It's like, "Shut up and communicate to them. Don't tell them what you're about to do, just do it."

[music]

43:47 CP: I'll ask students at the beginning of class, "What's the biggest challenge you have when it comes to communications?" And almost invariably, there are at least a few students who will say, "I am terrified when I have to get up and do the dog and pony for senior management." And I'll say, "Okay. So what makes you so nervous?" "I don't know, I don't know. I just get up there and I freeze." And I'll be like, "How many times did you rehearse what you were going to say?" And they'll be like, "Well, I kind of walked through it in my head." And it's like, "No, no, that is not a rehearsal, that's just kind of getting an image in your head. You want to be really outstanding on stage? Then you need," and I stress, "Need... To actually invest yourself in the whole notion of rehearsing counts." People think they're rehearsing, when they say, "Okay, now first, I'm going to say this, then I'm going to say that." And they think that is rehearsing. Rehearsing is where you actually practice the opening 30 seconds over and over and over again.

[music]

45:00 KL: Why are you picking 30 seconds? What do you want people to do?

45:03 CP: Actually, it's more like 20 seconds, but if you got them for the first 20, you'll own them for the next 10.

[laughter]

45:09 CP: The whole idea on the opening 30 seconds is, executives tend to have an inflated sense of self, they tend to believe they are important. And whenever you're getting into a meeting with a senior, senior executive, they basically are expecting that moment of, "Yes, your Majesty. No, your Majesty. Tell us how low to go, your Majesty." And they want a little bit of bowing and kowtowing. And the way we can actually do that is to let them know right off the bat, "I respect your time." And in those opening 30 seconds we want to be able to say, "Here's how I'm going to use your time with value." Some people will use that as an administrative moment. Instead of talking about just where they're going, what they want, what they're hoping for, how the world looks different when we're done here. The kicker is that instead of that they'll say, "I'm only going to be here for 10 minutes and it's an important 10 minutes to me and my career." And it's like, "Stop that." Instead, tell them what they're getting out of it. Tell them that they are the only ones who can really help them realize that benefit and drive those messages home.

46:21 KL: And then also it structures the rest of your conversation and you've given us the hints. It establishes so much of the presence of the room. Why we're there, recognition of other people's authority, the value of time and all those things as well.

46:34 CP: And the reason you settle basically on 30 seconds is, that if you have not at least gotten somebody to buy into part of your discussion in 30 seconds, if they have no vested interest in listening to you, they will check out and in some cases, they'll actually shuffle you out of the room.

46:53 KL: "Give me your opening 30 seconds." I like that a lot.

[music]

47:01 KL: Not hitting the benefits, not actually taking the time to rehearse. What else we got?

47:05 CP: "Uh. Um. Well, um. Er, uh. You know, um." That whole string of pausing behaviors. They are crutches. And kind of intriguing, I got these coaching tips, if you will, from a woman named Lillian Brown at Georgetown University. And Lillian was, for the longest time, the green room coach for CBS News, down in DC. Yeah. And it was fun because she was the one who got normal average street people to not sound like morons when they were being interviewed on CBS News. And one of the things that people would do is they would come in, they'd go, "Well, uh, I'm going to say uh, uh, uh." And she would stop them, tell them to take a deep breath, and then she'd say, "I want you now, instead of saying, uh, I want you to say...[silence] " And that was it. Just leave that moment of silence. Every place you would normally say, "Uh." I just want you to consciously go ahead and say "uh" in your head but when you're opening your mouth, let nothing come out. And so if somebody has the behavior of saying those words a lot it comes across as a different cadence of speech. And in fact, you might recognize it in two people, William Shatner and Barack Obama.

[music]

48:32 KL: So what else we got? Keep going.

48:34 CP: Oh, let's see. Almost any behavior that you do, that you think is potentially distracting, if you can't get rid of it... And mine used to be rocking. I would physically rock from left to right, just altering my weight from my left to my right foot. And I had a student who came up very early in my career who said, "Carl, I wanted to tell you something and I hope you'll take this the right way." And I said, "What's that?" And he said, "You rock." And I said, "Thank you. Thank you very much." And he goes, "No, no, no, not, you rock." He said, "You're actually physically rocking left to right and some of us in the back of the room are getting seasick." And I took note of that and I talked to Lillian about it because it's like, how do you get rid of something that is an innate behavior?

49:20 KL: Right.

49:21 CP: Lillian's answer to almost all these is, exaggerate them. Now, when I'm actually...

49:26 KL: That's an interesting recommendation.

49:27 CP: It is. It's crazy, but instead of rocking, which I can't not do, I pace the entire room.

49:34 KL: You walk back and forth.

49:35 CP: Yeah.

49:35 KL: Push it harder.

49:37 CP: Yeah. Exactly.

49:37 KL: Go farther, left and right.

49:38 CP: And as a result, I'm changing the dynamic of the room. I'm breathing new energy into the room. People don't notice it as a distracting behavior. Because I'll move over to the left, then I'll stop for a second, look people over there in the eye, then I'll move over the right and I'll look people there in the eye. And it gives the sense that it's a more dynamic moment, not that I just can't stand still.

[music]

50:05 KL: You talk about planting ear worms. So tell me about ear worms, tell me about planting and tell me how I'm going do it.

50:11 CP: "Join with me." And the reason I want you to *join with me* is because I think you could actually pull this off if you would simply *join with me*. *Join with me* in doing, a. *Join with me* in doing, b. *Join with me* in doing, c. The phrase. I had the honor of doing a training for Marriott and I had hyped from the moment I began the presentation to about the mid-way through the presentation when we hit the ear worms piece and I kept saying, "Join with me." And I wrote the three initials of "join with me" up on the whiteboard. J, W, M. JW Marriott. JWM is the Marriott logo.

50:57 KL: Right.

50:58 CP: And when I wrote it up on the whiteboard everybody in the room went, "Oh."

51:01 KL: So what's... Your suggestion here is that you're trying to find your key theme and make sure that that's layered in.

51:06 CP: Yeah. And there are a million ways that people do this in conventional day-to-day. You go into a meeting and you say, "I just want you to remember the three Ws. I want you to remember the four Ps. I want you..." And just by creating some simple mnemonic to actually log it into their head for good. And if you can do something that is specific to the organization, all the better.

[music]

51:37 KL: I'm going to flip it on you now. What should the executives or I'm thinking program managers that have project managers speaking to them, how should they be listening?

51:47 CP: I think the first and foremost is, tell them why you're there, why you're in that communications moment.

51:55 KL: Not why they're there, why you're there. [laughter]

51:57 CP: Yeah, exactly, why you're there. And go ahead and tell them. And if you're looking for the opening frame of that sentence, it is, "When we're done here, here's what I would like to walk out the door with."

52:10 KL: So setting expectations and what they're trying to rise to.

52:12 CP: Or if you gave them that tidbit and you're reminding them.

52:15 KL: Yeah.

52:15 CP: Now it's a matter of you're affirming. If they did their homework, they're about to look like heroes. They are genuinely going to look like the best and the brightest. The other thing is, is when you see them foundering. We don't handle that well. The American cultural tolerance for silence is 15 seconds.

52:38 KL: That's a long time.

52:39 CP: Oh.

52:40 KL: Actually, I freak out at six seconds on these interviews.

52:42 CP: Give them at least seven seconds.

[laughter]

52:45 CP: Don't feel like, "Are you stuck? Are you freezing? What's the matter here?" Just give them that seven seconds, just kind of tick it off in your head and let it go.

52:58 KL: So give them the space.

53:00 CP: Give them the space, yeah. And if they're freaking out, tell them the last thing they shared with you. Give them an echo on something they just said. For one, it proves you were actually listening. And it doesn't have to be something profound, it doesn't have to be your interpretation of what they just said. Because sometimes people just flipping lose their place.

53:19 KL: It's also a call to those of us as Project Managers to recognize that we're managing people and they're having the same problem with us, the same concerns. Problem may be overstated.

53:28 CP: Yeah.

53:28 KL: But we might be working with people who are also a little concerned coming forward and telling us that there's an issue with a piece of the work they're dealing with.

[music]

53:41 KL: Connect this to risk. How is this communications skill important in mitigating risk?

53:51 CP: For one, risk is often miscommunicated or it's communicated in such a way that it drives panic and...

54:02 KL: Strictly speaking, communicating around risk itself.

54:04 CP: Yeah, just having the risk conversation. And it's kind of intriguing because a lot of this

ties to openness. If you ask somebody... If I ask you...

54:14 KL: Yeah.

54:15 CP: I'm going to Detroit in a couple of weeks, I'll be flying up to Detroit, flying out of BWI Airport and what could possibly go wrong? And you might run through a laundry list of, well, you might be delayed, your luggage might get lost and all that. But most of my students tend to studiously avoid saying, "Hey, Carl, your plane could crash and you could die." And it's like, "Yeah." And when somebody does say that in the classroom, everybody in the room looks at them and, "I can't believe you even said that." And it's because people don't want to be seen as conveying the negative.

54:51 KL: So you took this as openness, the communications around openness around risk. Or communicating risk on a project.

54:56 CP: Yeah. It has to be there and we can't punish people by saying... A lot of people will speak up on risk and you, "You know, that's a really good point, that could happen. You're going to own that from now on." I don't want to own it, I just wanted to bring it up. And as a result, people tend to clamp down and not want to talk about risk as freely.

55:15 KL: So I'm hearing the two sides of it again. We need the project managers to be willing to talk about risk and we need the people, we'll call them executives for this purpose, the people they're talking to, to allow them to speak to risk.

[music]

55:32 KL: How else do you tie this in?

55:34 CP: Words matter.

55:36 KL: Tell me more.

55:36 CP: Word choice matters. If you say words like, catastrophic, disastrous.

[chuckle]

55:44 CP: No, and some people... These are words that belong in the risk community. Disastrous, catastrophic. You take words like those and it's okay, that's very bad, very, very, very bad. But instead, if you talk about, "Well, here's a significant risk that may impact us and here's the potential resolution for that risk." If you couple those together suddenly the whole thing softens. If you come at people and people do this, the top 10 list of risks, they'll say, "Here's our top 10 list. Bad thing, bad thing, really bad thing, negative thing and then you die." If instead, you say, "Well, here's a bad thing that might happen. And just so you know, if it does come to pass, here are our strategies, here's the game plan and here's how it winds up if we actually put that game plan in place." If you couple the risk events with our mitigation strategies, if you communicate them in tandem, you go a long way towards ensuring that people are not just completely, utterly, totally freaked out by them.

56:54 KL: I can imagine these first 30 seconds are going to be really complicated in a risk

discussion. Poor executive saying what I hope to get out of this today is, is see how well we're doing on the project, and you open with, "Well, I'd like you to know how catastrophic everything could be unless you give me the money, in which case it's going to be a great benefit to all of us."
[laughter]

57:12 CP: Yeah. Well, I actually think you want to go the other way. Is, "I'm going to spend our next 15 minutes together" or however much time you've got with your executive. "I'm going to spend our next 10 or 15 minutes just reviewing for you the potential concerns we've identified and how we're going to land on our feet by virtue of your assistance."

57:34 KL: There we go. "By virtue of your assistance." It's that call to action that's inherent in their role.

57:39 CP: Yeah.

57:41 KL: That only they can do.

57:41 CP: They're the big dog, they asked for the job.

[music]

57:46 KL: If you take two things away from that discussion, they should be: BLUF, Bottom Line Up Front, and rehearse your opening 30 seconds, out loud, multiple times. You can find all seven of Carl's books on risk management, communications tools and PMP exam study guides on Amazon. Actually, I hope you found many takeaways from this episode, the importance relating your project to the greater organizational strategic plan and the intended benefits and outcomes. Establishing feedback loops and keeping the lines of communication open. Basically, the better you can communicate and network, the more effective you will be in managing your projects and making them relevant to the bigger picture. Special thanks to my guests, Dr. Kenneth Smith, John Stenbeck, and Carl Pritchard.

58:34 Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblat, Lionel Lyles and Hiroaki Honshuku. Post production performed at M Powered Strategies.

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