

59. Cooper, Linder, & Rutledge

Psychometrics: Myers-Briggs and Beyond

0:00:00 Kendall Lot: Hey PMs, what would you say to an episode covering self-awareness, self-management, relationships, conflict, leadership, behavior and values? If you're thinking, "Yes, tell me more." Then you are listening to the right podcast episode.

0:00:17 Ray Linder: The challenge that we have when we're working together is I have no earthly idea why, out of all the behaviors you could have chosen, why did you choose that?

0:00:25 Hile Rutledge: The root of most of this work is self-awareness and self-management. How do I understand me and how do I manage myself?

0:00:33 David Cooper: As managers, if we are the coordinators of others' actions, as leaders we are there to inspire the action of others.

0:00:41 KL: As a wise man, no, actually a wise woman, and specifically, our PM Point of View editor Mary, who has now edited over 300 hours of PM raw feed, once said, "There is no 'I' in project. It's all about team work." Yep. A project is only as good as the team that executes it. But when you bring a group of people together from different backgrounds, viewing the world through different lenses, with various needs, issues and motivations, the road to your end result can get pretty bumpy. How can you as a project manager help make the crooked places straight and help team members work together in a productive way? Putting effort into getting the team in good shape, behaviorally, and in sync, is an important part of the PM's job. It's risk mitigation and has real business results.

0:01:27 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 is your host, Kendall Lott.

0:01:40 KL: There's a dizzying array of assessment tools designed to help individuals and teams understand themselves and each other. In the next hour, you'll hear about quite a few. You've probably heard of MBTI Myers-Briggs Type Indicator. Then we have Strengths Deployment Inventory, SDI, the Pearman Personality Integrator, Emotional Intelligence Quotient, measured by EQI, and Team Performance Inventory, or TPI. There are as many of these assessments as there are consultants. But more than labels and letters, these are ways of generating a vocabulary that can help any of us become more of ourselves, more of a contributor and more of a leader.

0:02:16 KL: They help us with a common goal, and as one speaker says, "To insert ourselves into satisfying relationships; relationships we need to get the job done." But they are powerful and they should be handled with care. If you're going to embark on any of these processes, these assessments, you need serious guidance. Really, today's show is about bringing out the best of you and the best of your team. For this episode, I've assembled a round table of experts who can help

you sort through some of the options, the benefits, and the pitfalls. Let's let them introduce themselves.

0:02:49 Hile Rutledge: My name is Hile Rutledge. I'm the President and Principal Consultant of OKA. We are a training consulting firm in Fairfax, Virginia. We've been around since 1977. We specialize in leadership and team development.

0:03:03 KL: And then I have Ray Linder. Ray, tell us who you are and what you do.

0:03:06 Ray Linder: I'm also an independent consultant in the organization development, leadership development, team development space, if you will. I've been doing this for about 20-so years. I guess the theme of my work is helping people be themselves with more skill.

0:03:21 KL: And David Cooper.

0:03:22 David Cooper: Yeah, hi. I'm a senior consultant with Impact. We're a global people development firm, and we do leadership development, executive coaching, team development across the globe.

0:03:36 KL: So, let me start with you, Hile. One of the oldest I think running around is the Myers-Briggs Type Indicator, and it has a huge database of people who've taken it over the eight decades now, maybe.

0:03:47 HR: Close.

0:03:48 KL: Something like that, seven or eight decades. And I think a lot of the PMs that I've spoken to at Chapters, for example, where I've seen them coming together, will be familiar with it. And those of you that think you've heard of it, it's the one where you get four letters. Everyone knows it as, "Is that that four letter one?"

[chuckle]

0:04:04 RL: Yeah.

0:04:05 KL: It's not a four-letter word, and it's not just a label. So, what I want to do is I want to talk about some of the indicators to get a sense of what they are and what we can choose from to help learn about our teams, our leadership skills, our individual skills. So Hile, kick us off with that one.

0:04:19 HR: So, psychological type is the theory that's at the heart of, at the core of, the Myers-Briggs, but a number of other tools. A more contemporary tool that looks at this type theory is the Pearman Personality Integrator, that even DiSC, that's a common tool, the Big Five, Temperament. There are a number of popular models that actually have one or some roots in Jung's theory. Carl Jung supposed that we have hard-wired preferences, kind of like our preference for left or right-handedness – that we have hard-wired cognitive preferences for how we as humans prefer to take in data and make decisions. And at the core of type theory is that concept.

0:05:06 HR: And understanding that, and understanding how to work with that, is one of the

reasons why Myers-Briggs and all of the type tools, Pearman and all the rest, have become so popular is that, if we're going to that level of human activity, of brain activity, of taking in data and making decisions, that touches almost everything we do. Certainly, as a PM, but even in life in terms of communication and influence and motivation, conflict, feedback, interaction with self and interaction with the world. It touches on everything, and that's one of the reasons why it's become so ubiquitous.

0:05:45 KL: And so important for project managers, I think right there, you just hit something. Communication, conflict, and feedback. This is a realm that we 'swim in' by definition of having to do the work that we do. So, this is talking about being hard-wired in cognition. One of the ways we describe work is it's about problem-solving and decision-making. You say this is right where this heads into.

[music]

0:06:08 KL: Tell me a little bit about the Pearman Concept. How is that different?

0:06:12 HR: So the Myers-Briggs is structured around a model that is designed to sort you into this bucket or that bucket. And so, in terms of how you make decisions, your preferences for T-thinking or F-feeling is, are you more objective or subjective in your decision-making? But the whole purpose of the assessment is to dump you in one of those two buckets, thinking or feeling.

0:06:35 HR: Well, the idea with Pearman, the Pearman Personality Integrator, it takes that same core idea of judgement, but it actually places you on a continuum. So, you're somewhere between, in terms of how natural is thinking or feeling for you. And independent of how natural this is for you, and you're somewhere along this continuum, is a separate question of, what do you act... What do you actually do? And so, for instance, you may very well find feeling more personal-based, more subjective judgments, more natural, but as a PM, your behavior is more objective and analytical because it's more appropriate for the project you're on. And so, what your preference is, isn't the behavior you engage most of the time.

0:07:21 HR: The Myers-Briggs, as great as it is, has never really looked at that. The Pearman actually allows us to sort out what's most natural and then separate from that, what's the behavior you actually engage? But both of those tools, even though they're very different in their structure, and what they choose to shine a light on, they're still rooted in this core idea of Jung's which is cognitive preference.

[music]

0:07:53 KL: So let's take a move away from that then a little bit now and head over to the strengths deployment inventory, which I think, Ray, you wanted to speak to a little bit there. This strikes me as a little bit of a different kind of tool.

0:08:06 RL: Yes. Yeah.

0:08:07 KL: What's the underlying psychology going on there and why is it relevant for us?

0:08:10 RL: Yeah, definitely. So, if you think of what the Myers-Briggs does really, really well is it

helps people understand kind of what was the process by which someone made a decision to do this particular behavior. What the strength deployment inventory does and it's based on a theory, an underlying theory called the relationship awareness theory, and I like to say this theory answers a basic fundamental question that every single person in the human race wrestles with countless times a day, which is this. You see someone's behavior and immediately, the question starts screaming in your brain, "Why are you doing that?" Like we are...

[chuckle]

[overlapping conversation]

0:08:52 RL: We are constantly mystified by, not the fact that we see what they're doing, that's very, very clear to us. So, there's no question that I can identify what you're doing. The challenge that we have when we're working together is I have no earthly idea why. Out of all the behaviors you could have chosen, why did you choose that? Right? And so, that's my playful example. But relationship awareness theory really helps us understand when we're interacting and relating and teaming and working with each other. It gives us an insight into out of all of the behavior choices that are available to us, why did I make this one? What was the motive that drove me to choose this behavior as opposed to a number of other behaviors?

0:09:39 RL: And that would be the first statement of the theory. I'll give you the other three really quickly. So basically, the four guiding principles of relationship awareness theory. The first is behavior is driven by motivation. So, something prompted me to choose this behavior as opposed to some other behavior.

0:09:55 RL: Secondly, and where relationship awareness theory really is extremely useful is, obviously, the fact that I'm having this question that I don't understand what you're doing. More often than not, that's going to lead me to make some sort of negative judgment about that, which means we're going to end up in conflict. And relationship awareness theory very explicitly makes statements that the motives that drive my behavior in conflict are different than the motives that drive my behavior when I'm interacting with you in an effective way, right? And so, it really kind of opens the door to helping us understand in those moments when we're in conflict with others, now what's driving our behavior?

0:10:32 KL: So I'm often like this, but when I become motivated by conflict...

0:10:36 RL: Yeah. I become someone else.

0:10:37 KL: I don't need to be that kind of person that I think of myself.

0:10:40 RL: No, I would...we say that people, when they look at their assessment, they agree that that's who they are when they're in conflict, but they totally agree that those might be two separate people. I like to think it's like two personalities within one. There's the me who shows up when you and I are interacting well, but now, I'm annoyed with you and I'm annoyed at some visceral level, and now there's another me that shows up that I can say is actually me. I get what I'm doing now because what I'm doing is a response to the fact that I'm in conflict with you. And when that conflict's over, then I can revert back to the behaviors that drive me typically.

[music]

0:11:19 KL: There seems to be something of a connection here with the Pearman model, which gets to this idea that there's a behavior that is evidenced, the part that you see. And now, this is digging in. So now, when you see it, there's two different types of seeing you might have, the regular person and the conflict person.

0:11:32 RL: And the conflict person, exactly. Exactly. So, that's the second statement. Motives change in conflict. The third one is the behavior choices that, which in strength deployment inventory are called strengths, deployment of strengths, occasionally, we overdo them. There, I find a really nice kind of overlap with principals of emotional intelligence, right? Am I in touch with myself to know that I'm using my strengths actually in an effective way, as opposed to over-utilizing strengths. Now, I'm using them in a non-productive way, and I may be unintentionally causing conflict, when my attempt to be persuasive is interpreted by you as I'm coming off as abrasive. Or my attempt to be methodical is interpreted by you as being overly rigid.

0:12:21 KL: So, too much of a good thing is a thing.

0:12:23 RL: Too much of a good thing is a thing.

[music]

0:12:29 KL: So that takes us to the EQI a little bit there, right, the Emotional Quotient Indicator, in the sense that it's about the amount of something. You have to hit it at the right amount. You need to be able to have a behavior that's sufficient to be productive but not so overblown that you're no longer productive.

0:12:46 RL: And I think it's that awareness of how your emotions are driving your connection with that behavior and your self-awareness of that behavior, as well as the impact that that behavior is having on others. It's kind of owning how I'm coming off to you not making that just your problem. That, "Well, it's not my fault you're perceiving me that way." Well, it's like, well, I'm the one using the behavior, so on some level, it is my fault that you're perceiving me that way". Anyway, real quick, the last statement in the theory is that our filters by which we frame the world influence how we see the world. And this addresses another really common problem, I know we're going to get into talking about teams, but I like to say that the number one problem on teams is that you have a number of people looking at the same thing who aren't seeing the same thing.

0:13:37 RL: You know, what I see, I describe as this, but you're looking at the same thing and you describe it differently. And it's all those other things I just described around relationship awareness theory, that, if my behavior is being driven by certain motives that I find emotionally satisfying, then when I look at the world, I'm going to be immediately looking for, do I see in this view of the world things that matter to me? And I want to make sure everybody else sees those things too, because clearly, they're the most important thing that everyone should see.

0:14:08 KL: Yeah.

0:14:08 RL: I'm looking for evidence that the things that I think matter aren't there because then it's someone's fault that the things that are important to me aren't there. [chuckle]

0:14:16 KL: Like, why aren't they there?

0:14:17 RL: But you're having the same conversation with yourself, and you've framed it totally differently. So, those motives, again, that drive our behavior that we find emotionally satisfying when we're interacting with other people create a certain frame or filter by which we see the world and helps really get to why is there conflict.

[music]

0:14:41 KL: So, let's turn now to David Cooper on Team Performance Inventory. So, we've moved to team. Is this around personalities and the individuals on the team or the performance of the team itself?

0:14:51 DC: Performance of the team, we're not measuring against a preference, a psychological type within the team. What we're actually providing is a diagnostic look at how that team interacts together and how that team can build more success higher performance within that team. And what becomes really nice about that is as Ray talked about within teams, we don't necessarily know how people are showing up, how do we get access to their behaviors and what they mean, how do we get access to how they are making decisions from a preference standpoint, and ways in which they are wired to show up within a team setting.

0:15:32 DC: And so the team performance inventory is based on the impact team performance model, which is going to be new to a lot of folks external to our organization, even though with our organization, we've been using it with clients for the past 10 to 15 years, and it's been in development for about 20. Our organization itself is about 37 years old. So, during that time, where we have been working with teams, where we've been doing research into teams, we've discovered that what we were really after to drive success and performance in teams was a more comprehensive model that gave us a look at the critical needs that exist within a team, within a group, within an organization, that give them a line of sight to how they can be most productive, how they can achieve the highest performance levels possible.

0:16:21 DC: What do we know about teams from one, a unique set of individuals, which sometimes gets lost when we start to look at team-theory? And with those unique sets of individuals coming together, what are the real actual needs that they have outside of looking at maybe just their journey or maybe looking at just what gets in their way? What can we do to determine, "Here are the real needs that underpin their success."? So the team performance model is a model of six domains that address those critical needs within a team.

[music]

0:16:55 KL: Is there an underlying group dynamic theory in psychology that's driving this or this is framed by?

0:17:03 DC: There's not. What it is underpinned by is, just the team's research that has come before it and our own internal team research. And what it provides then is a very agnostic tool from the standpoint of the approach we take or the solution set we arrive at to address the needs in those teams, which is why it becomes a great diagnostic tool to inform what we then go to to solve

various issues.

0:17:30 DC: For example, two of the domains, one is effective relationships, one is quality conversations. These domains have to do with our interpersonal interactions within the team, the extent to which we have open trust honesty within the group, and are we building the type of relationships that allow us to succeed and reach higher performance levels. If that's a gap for us, then we often can go to something like Pearman, we can go to MBTI, we can go to SDI, to get data sets within the team to have...

[overlapping conversation]

0:18:03 KL: Back with the individuals.

0:18:04 DC: To build those relationships more.

0:18:06 KL: Does that imply targeting in that tool? Is there some idea that there's a level that you need to achieve? And this diagnostic shows me how I'm not at that level, or is that part of the subjective frame itself? What level should you be at? What is your culturally appropriate level of these pieces?

0:18:22 DC: Yeah, it's a great question because what that question asks is, "What's the team performance inventory actually gathering?" And what it's gathering is a full team view of the team. So what it's doing is the inventory itself is responded to by all team members, all group members, all organization members depending on how you're deploying the tool itself and what you're getting is access to everyone's opinion, interpretation, perception of if you will, those domains. And so, what we're looking for ideally is full alignment, what we're looking for is a team, an organization, to say, we all collectively agree that we are doing these things that are related to this particular need, this particular domain.

0:19:06 DC: So the metric we're looking for there on a scaled question if you will, in this case, which is one to six, is we want all sixes, when we look at the 30 questions that pull out from this inventory, ideally we want all of our respondents to say, "Yes, we completely agree that we're doing this all the time," because any variance in that shows us that someone believes that something is going on from their perspective, their voice isn't being heard, they don't have the structure in place to have, the rules of engagement or what we would call an agreed approach that allows them to be as successful as possible. They don't have a unified purpose, which is another domain that looks at, what is the shared purpose of this team, and if we're not all in consensus of and committed to that same unified purpose, then there'll be long-term gaps that exist behaviorally in how we're deploying ourselves against the team goal.

0:19:57 KL: PMs certainly can connect to the first couple of domains that you rolled out there around having good conversations, I think the other problem is trust, is that what you...

0:20:04 DC: Effective relationships...

0:20:05 KL: Effective relationships, good conversations. And you just mentioned a common purpose, agreed upon purpose, what are the other three?

0:20:12 DC: External alignment, which has everything to do with all of the internal and external stakeholders outside of that...

[overlapping conversation]

0:20:20 KL: See that's stakeholder management right there...

[chuckle]

0:20:22 DC: Stakeholder management. Another big domain, which will be very familiar to project managers, is agreed approach. And this is the domain...

0:20:29 KL: Oh how we're doing it?

0:20:31 DC: Yes.

0:20:31 KL: Yeah. Right.

0:20:32 DC: It's the domain that...

[overlapping conversation]

KL: That's your Gantt chart, people!

[chuckle]

0:20:34 DC: Yeah. It's the domain that tracks specifically to any operational excellence models that folks are using. And one of the great things about the team performance model and the inventory is that it bolts onto, maps really well to, any operational high performing teams models that groups may be using. So, if we're doing Lean Six Sigma, if we have some sort of project management, practical operational approach in place, it maps to that because it gets us out of that tactical moving widgets from A-to-B manufacturing, distribution, managing the movement of things and people, etcetera, into all of these other things that get in our way when we're working together.

[music]

0:21:17 KL: You just said some magic there. So, if we've got PM's still listening here, they are like, "Oh wait, Lean Six. Now, I have this other tool I can go get, and buy, and get my teams going." So, sorry guys. You didn't connect yours to a PM tool.

[chuckle]

0:21:28 KL: So, we just got there. If you could say the words agile, or even spell it, often you get people's ears poking up. But there's actually something interesting in here with that. So, agile has a lot of meanings. And I'm no expert in it. But, one of the techniques that is used in one form of it is around these scrum meetings, which has to do with very rapid, basically facilitated meetings. And there's some structure around how they do stand-ups. And how they work through the week. And how they sort their work.

0:21:53 KL: And it requires rapid and effective communication so that people can get on to the work they're supposed to be doing, the work they need to be doing that has been identified in the common purpose as the high priority at this time. And by the way, get these barriers out of my way. And they have that conversation very rapidly. That's a need you would have in that approach that you guys would be able to say, "This is why we have to be at that level." It also strikes me that what you guys are saying about how the individuals interact is going to matter.

0:22:17 Group: Oh yes.

0:22:18 RL: The idea of a Scrum style of communication is perfect for in the SDI, the red types who are the assertive directing...to whom their communication style can be described as, "Be brief, be brilliant, be gone."

[chuckle]

0:22:30 RL: Okay. So, the Scrum is perfect. But the Analytic-Autonomizing types, the greens in our model, they're like, "do you have any supporting data for that? I need to ask... Can I ask five or six questions about that point that just came up?" And where the Scrum leader's thinking, "Okay. We've got a five minute meeting." There's some others in there, five minutes isn't going to be nearly long enough. My questions will take up five minutes alone. You've got the folks like me, the red greens, Judicious-Competing types. And I'm thinking, "Okay. Yeah. I don't mind a five-minute meeting as long as it's on the right, most impactful stuff. Otherwise, this is a complete waste of time. Even five minutes could be a waste of time if we're not talking about the right things."

0:23:10 RL : And so from a model standpoint, from an agility standpoint, we can agree here's what agile means. And here's a thing that helps us be agile. And yet, each person based on their preferences, based on their motives, is going to react to this thing that we all agree, "This is a really good thing." But each of us has a different way of engaging that thing. Hence, the friction, hence the conflict, hence the lack of productivity.

0:23:38 KL: So, that's interesting. We can even agree per the model, but still end up in conflict.

0:23:41 All: Absolutely. Absolutely.

0:23:42 KL: This idea that we have an agreed way of doing it, and an agreed purpose. And still end up in conflict. And that's where you're back to the individual interaction matters, and why I need to know about the other person.

0:23:52 RL: Absolutely.

0:23:53 DC: When you talk about Agile leadership, you don't get too far down the path before you talk about servant leadership. And from the standpoint of servant leadership, doing that in a very tactical, practical non-interpersonal way only gets us so far. The underpinnings and the foundations of what a true servant leader is, is everything that we're talking about with these tools today from an emotional intelligence standpoint, from a building your capacity for that relationship awareness, and for building your capacity to facilitate individuals in teams or working groups to perform, at their best by getting to some of these underlying preferences, to getting to some of these underlying

pieces of conflict or data points that are getting in their way of being their best selves as a group together.

0:24:47 KL: When you hear that discussion going on around how do a PM might handle teams Hile, what are you thinking from the hard-wired nature of the way we perceive data and then execute decisions, the type indicators that we're seeing?

0:25:00 HR: One of the big differences that I see in the TPI from all the rest, emotional intelligence SDI, all the type tools, is that those tools think about individuals and then think about teams as collections of those individuals. And one of the reasons why, especially the Myers-Briggs and the SDI have become so popular, and Ray I'd be interested to know if you agree or not, is they allow you to... Once you administer the tool, to actually have all of the data collected in one visual, either a type table, a grid with the Myers-Briggs or the triangle, the classic SDI triangle, where I can have two, twenty, a hundred, whatever, people kind of captured at once and see, "Where am I versus you Kendall."

0:25:47 KL: An aggregation of these...

0:25:48 HR: An aggregation of everything. And so, when we think about team, we think about the team is made up of all of the individuals together. And the TPI is unique in that it's all of the individuals or a sampling of the individuals just project this concept of the team as a whole, and it really isn't an aggregation of all of the members that make it up, which is a really unique way of looking at this. So to your question though about how do I see like the Myers-Briggs or the type tool working into this, I would add to that the SDI and the EQI in that I believe that at the root of most of this work is self-awareness and self-management. How do I understand me and how do I manage myself.

0:26:34 HR: And it's hard for me to work on relationship stuff including conflict stuff and including team level stuff, if I don't at least first have some sense of, this is who I am, this is why I do the things that I do, and once I have that, then I can think about now how do I connect with you and how do I connect with you, when things are going well, when we conflict, how do I understand that better and work with that better.

0:26:58 HR: And then we can go to the next step and think about leadership or team, but the foundation, the fundamental Lego that we use in building the structure is self-awareness and Myers-Briggs gives you that self-awareness through this beautiful long-standing cognitive model. SDI is really, really unique because it's really the only one of value that I've found that really talks about values, why you're doing the things that you're doing. And then there's a conflict piece as well.

[music]

0:27:36 KL: And now, the commercial break. Symposium season 2019 is starting and this year the University of Maryland's Project Center for Excellence is bringing you out of this world topics for turning knowledge into practice. One of the keynote speakers is Wanda Peters from NASA with multiple graduate degrees in engineering and as a graduate from the Senior Executive Fellow Program at Harvard's Kennedy School, she knows about complex projects.

0:28:01 KL: And from her working career, Wanda understands how the US Federal Government

develops complex projects, contracts for them, budgets for them and manages them. She's speaking at UMD on performance management from her perspective as the Director for planning and business management in the flight projects Directorate at NASA Goddard Space Flight Center. You know, you want to sign up for this year's symposium taking place on May 9th and 10th, just type pmsymposium.umd.edu in your browser and you'll know what to do from there. Now back to our show.

[music]

0:28:37 KL: I'll go with the Greek's know thyself, but why does it matter that I understand someone else's motivation, when I'm trying to get something done in the context of a team. I've got their card, I got my card, I got their card. I'm looking at the team like, "Oh he will respond this way." Why does that actually matter?

0:28:53 RL: Well, it matters tremendously in that, if each of us is framing the world a certain way, and that frame that we have helps me decide how I'm going to choose, if I want to interact in a way with someone that they're going to make choices that benefit me. I need to walk into their frame. So if I'm thinking about people, who are very naturally... In the SDI they're called the blues and the fancy terminology is the Altruistic-Nurturing type people. Their motive, they look at the world and what they are looking for are opportunities where they can be helpful, where they can be supportive, where they can demonstrate trust and loyalty. So if I need to influence that person, and I don't want to sound like manipulation, it's really walking into their world.

0:29:42 RL: There are certain sort of magic words or magic ways where they will be motivated to respond and the simplest one with someone like that is, "Hey can I get your help with something?" And to them, they just, "help great, that's exactly what I'm looking to do. I've been dying all day to find someone to help." I mean it's almost that simple, that if I can understand how they're seeing the world, I'm talking to a Green on the SDI. These are the Analytic-Autonomizing people, the planners, the organizers, right?

0:30:12 RL: So I walk in, I go, "I've got all this data and information here that I'm really having a hard time organizing so I can make sense out of it. Can you show me how to do that?" You have their attention. And again, each of us is kind of looking for a way to insert ourselves into relationships in satisfying ways.

[music]

0:30:37 KL: How do you see leadership and how does this understanding of Myers-Briggs type of personality indicator matter?

0:30:42 HR: I define leadership as the intentional use of power with others towards some desired end. And so it's how I use my power to get something accomplished.

0:30:53 KL: Okay.

0:30:53 HR: Now where these tools play in, is that they help point you to where therefore is power-rooted. Type lets me know that in terms of how my brain is wired to see what is more relevant in terms of data, in terms of objectivity, subjectivity, in terms of the outer world, or the inner world.

Knowing these preferences lets me know where I'm likely to see power as resting. Where my values are rooted tells me where power is going to be located. So how I leverage, what I bring thinking, "This is the powerful thing I have to leverage as a leader," depends on you can look at it through type, you can look at it through SDI or you could go straight to the behaviors regardless of where they're coming from in terms of wiring or values. Just what behaviors do you do? You do more assertiveness than you do empathy, or you do a lot of assertiveness and empathy. Let's just count how much of these behaviors you do or you engage. That's a very values-agnostic EQ or behavioral view. Any one of those things will help give you some insight into the leverage or leadership tools you bring.

0:32:08 RL: Dr. Michael McAbee has a really, really simple definition of leadership and that is a leader has followers, if he doesn't have followers he's not the leader. So we need to just even start there. So, if I'm out in front and I look behind and no one's with me, I'm not the leader.

0:32:23 KL: So what do we mean by follower here? This would be people whose behaviors are achieving the same ends as mine?

0:32:28 RL: A leader is taking somebody, somewhere. If nobody's going with that leader, that person is not leading, because no one's following him to whatever this point is. In a recent class, it was actually a negotiation skills class, and someone used the phrase, he said, "What I'm trying to do is move the other person to a certain place." And my immediate response was, "Well you actually can't move anybody anywhere. They move themselves." I later amended that as, "Well, okay, you can actually make somebody move if you have superior power," to Hiles point about power. So if I have sufficient power I can overcome any resistance you have, because I'm strong enough to move you. Now that can be a horribly inefficient use of my power, right? Because if you have strong enough resistance it now becomes like this tug of war, and that takes a lot of time. Or I can have the power of influence such that the other person moves themselves. And that again, comes back to understanding your motivation, I understand your preferred ways of working.

0:33:31 RL: I'm using power in a different way. I'm using power of knowledge. I'm using the power of the relationship. I'm not using the power of the position, because I would argue the power of position is extraordinarily inefficient. Again, because I need to be stronger than you, and to the extent that we have somewhat equal power then it's going to take me a long time to get you where I'm trying to get you. So I'm trying to leverage the power of the relationship, the power of my positive influence, so that you're willing to move yourself.

0:33:58 KL: Now I wanted to ask you, in your context because yours is about the perception of the team around the domains of effective team-ness.

0:34:10 DC: Sure.

0:34:10 KL: Both in what we're trying to get done, how we interact, and how we perform work. Where does the role of leadership happen upon taking this diagnostic, upon understanding these domains, is there a slice for leadership?

0:34:22 DC: Yeah, it's an important slice for leadership for the team side of things, but for the whole conversation, because in the context of your question, I start to think about... You talk about management with leadership or versus leadership, and as managers if we are the coordinators of

others' actions, as leaders we are there to inspire the action of others, and if we're going to inspire action against any of these sorts of things particularly from a team standpoint, if we're going to inspire action or behavior in a shifting way to get folks to align to these different domains that the team performance model represents or more importantly to align to the needs that they surface that they have to address to be higher performing individuals and teams, then the leadership role there takes a shift into oftentimes one team member, so I can't necessarily become the hierarchical figure that feels responsible for those shifts in action and behavior.

0:35:24 DC: I may be accountable for that as the team leader. However, as team leader, to inspire that action and that shift, I need to become a facilitative leader maybe. I need to take a team role, a team member role, and become an active member of the team at the same level at the table together to drive and inspire the conversations that need to take place. Maybe at times moderating the conflict, maybe at times being someone that has a little more access to being able to facilitate the conversations necessary to get us to specific places within the journey. And, as leader, I'm taking a very intentionally specifically different role.

0:36:07 KL: This is moving into that kind of contextual leadership conversation, right? Where I have to shift how I'm leading, depending...

0:36:12 DC: Absolutely.

0:36:13 KL: And so, not the diagnostic per se, itself, but the domains that it's reflecting. A knowledge of that would be helpful to me to know, in what context I need to act differently to inspire this change, to close the gaps in those domains, to help us all be on the same page, do the same thing, the same way, in the same manner.

0:36:30 DC: Sure. Yeah. And a very important assumption that we are making when we deploy the team performance model and the team performance inventory, is to take the pressure, take a line of sight to, take expectations away from the leader. We're not looking to provide the leader feedback on that team. That would be actually dangerous from a team performance standpoint, for us to then turn and say, "Well, we don't do these things because you, the leader, aren't doing these for us." Well, no, we're all part of that team. So, the leader side of that, is that leader really finding an opportunity to make the team do the work. It's really important that the team engages in collectively responding to, and taking action against what they're highlighting for themselves.

[music]

0:37:14 KL: Is the gap in perception relevant or important? Is that a soft spot you don't push on, or you do push on? Because these people might take this... And where I'm going with this, is they may take this exam or these assessments. They will see scores, they will see their reference score, and they may say, "Wait a second, what's different here?"

0:37:33 HR: I think that gap is very important, in terms of not only a gap between what I think and what you think... What another person thinks. Because I think the single most powerful thing, and most useful thing that we in our work teams can do that we're not doing, is feedback, is actually open communication with each other. And in the perfect world, there are not a lot of gaps, because I share my view with you, you share yours with me, and we find a way to get closer, or bridge those things. That's a skill most groups or most teams don't have. And so one of the things that the TPI

does, that the Myers-Briggs, and SDI, and Pearman, all of them do, is they provoke gently...

[laughter]

0:38:19 HR: A process of getting us to come together and talk about it, within a vocabulary that is healthy and helpful. So, I think that gap is pivotal.

[music]

0:38:31 RL: It's enormous, because the fourth statement relationship awareness theory, filters influence perception. So, that filter we have that we look on the world creates an automatic sense of distortion right from the start. I'm not seeing the world clearly. I'm seeing it clearly through a particular lens that's already in front of me. So, there's already a gap that's built into every team, and to Hile's point, some of these tools help us begin the conversation of what those gaps are. But because the SDI is so well-known for its help with conflict, when I get called in, it's the perceived gap, is why I'm there in the first place. That, "Hey, Ray, I can't give this team to do X because I believe they are this thing, and we're in conflict all the time." And, "So well, tell me a little bit about them."

0:39:19 RL: And so the leader or somebody, whoever is trying to get this problem solved, is already seeing the world a certain way, and they're having conflict, which says that there is a gap. And then I get in there, and it's obvious why the gap exists. And again, it comes back to filters. I can almost tell, before I even give them the assessment, which I know sounds horribly unprofessional, or whatever. But just the way that someone frames what they think the problem is, just in the language they use, and their framing of the problem, I can probably narrow what type they are in the SDI, down to a couple. Just the language they use... Just I'm hearing their distorted view of the world.

0:40:02 KL: Yeah, I was going to say, I wouldn't caveat that with being unprofessional.

0:40:04 RL: Yeah.

0:40:05 KL: That means there's a sense that they're showing up a certain way and you're...

[overlapping conversation]

0:40:08 RL: Exactly. And I'm attuned to how they're showing up.

0:40:10 KL: Because that's how we're seeing...

0:40:11 RL: And the way that they're describing the other members of a team, I can guess, "Okay, well now I know where they live." Because this is the narrative that would naturally exist with a leader who shows up in one part of the SDI results, managing a team who's either in one area or spread in certain areas, whatever it is, I can almost see the group results in front of me as I'm having a conversation, because I'm hearing the gap being described from the filter that they're looking at that gap with.

[music]

0:40:44 KL: I'm a project manager, I have teams, I work inside an organization. When is it appropriate for me to be asking these questions to the point that even perhaps finding resources to take these tools? Is this all at my kick-off meeting? Is this when I got hired? When is a good time to start wrestling with some of this from a structured perspective?

0:41:04 HR: So there's no bad time to do it. But there're some people that because of who they are as people, because of the team, because of the culture they're in, just don't think about doing any of this work unless there's something broken that needs to be fixed, because if it's not broken, don't... "Everything's fine. Let's drive on." And sometimes the culture doesn't accept that kind of thing. We know we only devote this kind of resource to something that is broken. And in those kinds of systems, I find this kind of work is better used as a rescue or a tool for something that's broken; however, it's particularly powerful to use at any time especially as kick-off, team start-up, team launch, things are going well, let's understand why they go so well so we can maintain that and get better still. There's nobody, there's no team that can't get better, and so there's no inappropriate time to do it.

[music]

0:42:01 KL: Now, I'm suspecting yours and TPI falls in a different bucket a bit.

0:42:05 DC: Well, I think there's, "What am I dealing with here? Am I dealing with the individual conflict between a couple of folks on my team, or me and someone else, and is it a brand new project and a brand new team, and therefore I need some things to help me start building that team, and we're going to deploy these tools and resources in different ways based on... "

0:42:21 KL: In the TPI though, it strikes me that we need to have been working so that we have something to have a perception of.

0:42:28 DC: To deploy the team performance inventory, the TPI, yeah you want an existing team. With a brand new team going to be taking the team performance model, those six domains critical to success, and using them as a roadmap to begin to give you a line of sight or a pathway, if you will, to the things we need to be doing day one as we form a team.

0:42:52 KL: What I liked about TPI, thinking of it as a leader, to inspire action, is this is one way I can communicate. These six things matter to me for us, so they matter to us. Whatever we're doing on the project to produce the final product or outcomes and to work with our stakeholders and be successful, what we will be looking at are these 6 things, separate from, are we completing our Gantt, and PERT charts on time or on budget? Right?

0:43:14 DC: Sure.

0:43:15 KL: Is, this stuff matters.

0:43:17 DC: And you can arrive at that conversation very quickly because a big large piece of the research that went into this model is, "Let's look at the critical needs of a team." So if you sit your team down and say, "Let's just brainstorm for the next six hours on everything that is critical to our success and throw it up on a white board somewhere," it's going to bucket into the six domains of

the team performance model. They're just simply the critical needs of the team, so it becomes a very quick common language that the team will rally around as well.

[music]

0:43:50 RL: To some degree, really, really good tools. They're very, very robust. They explain a lot of reality very effectively, very accurately. And to do that, they are somewhat invasive. They're really speaking to the reality of the core of what it means for me to be me and in a team, I'm doing that somewhat in the presence of everybody else on the team, because obviously we're running team and group workshops, right?

[overlapping conversation]

0:44:17 RL: Right. So, one right time is somewhere, not in the beginning of the forming stages, because some of that is, "I'm still trying to feel you out and check what's my role going to be and who are you and who are we," and I'm a little bit emotionally guarded really early in the forming stage, but somewhere between the forming and norming stages is to me an ideal time, in that, to have really, really effective norms, those norms are going to have to reflect things are really super important to me. I've done a lot of leadership workshops. We actually use the SDI model to talk about, so for the people-oriented people, what would be the norms that would really be important to them?

0:44:57 RL: The performance-oriented people, what would norms be that are going to be really important to them? We want to have all that. So we want to have that conversation early on, but not too early. Ultimately, the ideal spot is whenever the team is ready to hear the lessons that come out of using these tools, and sometimes you don't know exactly when that is, and it might be in a moment of crisis, not the "ideal" time on paper, but if this is the time when everybody's standing up and ready to listen to all this, where they wouldn't have before, that's the perfect time.

0:45:27 KL: What constitutes readiness to listen?

0:45:29 RL: That's a much more intuitive thing. I think, really emotionally intelligent leaders they'll have a sixth sense about, "Now is the time where we need something, we're almost on the verge of crisis and we need some way of unlocking that," or, "Hey, things are going really well, but now we need some more intentionality to keep things running smoothly."

[music]

0:45:57 DC: And a really good leader is building the culture of and the capacity for that conversation day one in others.

0:46:04 RL: Yes, yes.

0:46:06 DC: They're really empowering, encouraging and providing access to the readiness so that they're not even necessarily the ones that are fighting it. And now, we have a group of individuals...

[overlapping conversation]

0:46:16 KL: What does that mean? You started with building capacity, got it down to empowering, what does that mean? What kind of actions look like that from day one?

0:46:26 KL: Sure. It's that emotional intelligent leader that is listening, as you say, intently for those things, but most importantly, encouraging the conversation and the interaction from the team at early stages to start to raise these things early on, whether that's going to our toolkit of simple team chartering and norming things where we're having these great conversations about, "Okay, what do our rules and engagement look like for you versus these other ones?" But just getting in there and driving those conversations very early on, that start to have everyone voice those differing opinions that end up giving us those gaps that we're analyzing later on, and potentially too late.

[music]

0:47:12 KL: What I'm hearing from project managers, these assessments, these are hacks. These are quick ways...

0:47:17 DC: Absolutely.

0:47:17 KL: To get into helping be better as a leader, better as a manager and better as a team member.

0:47:22 HR: In terms of project management, what are the warning signs that any one of these things might be a good approach? And in the hands of a good trainer they could use any one of the tools that we've talked about, it doesn't... "Oh, wow, you've picked the wrong one." Almost doesn't...

[laughter]

0:47:37 HR: In a way it almost doesn't matter as long as you're doing the work. There're lots of paths. They all lead to the same place. So, the problem-solving challenges and increased argumentation... that we're having trouble reaching conclusions and we're arguing more to get to those conclusions...

0:47:52 KL: That's a warning sign.

0:47:53 HR: That's a warning sign. Another one is there are scheduling issues. "We're having trouble scheduling. We're not being able to find times to be together. We're missing goals." That's a huge one from a PM perspective. Maybe we're not good at setting those goals or we're not good at managing our resources to meet those goals but something is wrong in the process. And then finally, reluctance to meet and/or avoidance to connect with each other, which could go back to the scheduling. So, there's an overlap in the diagnostic but these are warning signs that something's not going well, we could be working together more effectively.

[music]

0:48:32 KL: Showing that the project is falling behind or taking too much effort, costing too much, not meeting stakeholders' needs, the many things that we can be checking here, project managers, or, "My team is frustrated." We see it as a business outcome. "My project's falling behind," driven by, perhaps, how we're interacting or sharing information. Maybe it's not over a conflict even. But

to a project manager, this could be viewed as hacks for risk mitigation, hygiene. How do we keep ourselves healthy and ready to continue to work? Project managers, if you have to make the pitch to the bosses about getting the funding for something like this, you're mitigating the risk of potential conflict of just not performance. It may not even be strictly conflict. It just may not be focused like you're talking about alignment.

0:49:14 RL: What is virtually a standard part of many of the workshops I do, upfront, right at the beginning of the day, before we even got into the content, we say, "So, who is a key stakeholder on a project you're working on?" And I do ask your risk mitigation question, "What is the risk to your project if the relationship between you and your key stakeholder is not a good relationship?" So, we're actually defining the risk to the project, not in terms of the dollars and cents and time, and budget and resources. We're defining the risk of the project in terms of the actual relationship with a key stakeholder, how is that going to impact it?

0:49:49 KL: Project managers, you need to have written that one down because you know that goes in your kick-off meeting. You already do it, and it turns out that this is a way to start thinking about good hygiene on the tasks.

[music]

0:50:03 KL: When should we not use this or how should we not apply these? Specifically reflecting, many people I have dealt with will say, "Don't put me in a box. Why are you giving me a label?" "Labels don't matter." And then we see it in a more affirmative way sometimes where people say, "Oh, that's just because I'm a pick-a-color, pick-a-flavor. That's because I'm a green, I'm going to always be like that. So, I get a pass on my bad behavior today."

[laughter]

0:50:34 KL: "I'm just too busy sensing to understand what you're talking about, so whatever." So what would you say to people who have some resistance to these because of this concept of its labeling or gets used as excuses, or you're putting me in boxes, various things like that? And then more broadly, when is it inappropriate? When should we not try and use this?

0:50:53 HR: You never want to do one of these type or a sorting, a labeling kind of approach like the SDI does, like the Myers-Briggs does, if everybody in the group is not open to doing that. And open means somewhere between eager to do it and resigned that it's going to happen.

[laughter]

0:51:13 HR: But I'm at least open to go through this experience because it might be worth something or at least I'm willing to do it because everybody else seems to, and whatever. And some of the greatest fans we've gotten are people that had come in with that kind of weariness and skepticism who have then gotten some data to see that, "Wow, there is something to be used."

0:51:34 KL: Passion of the recently converted is always the strongest.

0:51:36 HR: Yeah. Absolutely.

[laughter]

0:51:38 RL: It's true.

0:51:38 HR: But if there are people there that, "This doesn't feel like a safe space. I don't want to do this. I don't..." We talked about being in an intimate space. Then we got into some intimacy, some disclosure... That if people aren't ready do that, you shouldn't. That's one of the reasons the Pearman is around. The Pearman has no labeling, has no... You don't come out as a this or a that. This is what's natural for you but here's what your behavior is and it notes that your behavior can change. You can opt to do something else, you can be an introvert that extroverts most of the time, and that freedom avoids putting you in a box. And it gives a lot of people the freedom to embrace type without that. The EQI is something that measures how much of this behavior do you do.

0:52:26 HR: And so while that does put you on a continuum and suggest something about you, the next step is, so if you don't do enough of that, you need to do some more, and so here's what you need to do to do that. Just like going to the gym and working out on a certain muscle, here are the things one does to access more assertiveness or whatever. So, there are ways that you can do this work that label and the labels can be powerful, and some people want that label. It's a bell that doesn't ring. If I went through this thing and didn't get my label or tribe identified. But then there are others that will push against that. So, let's go to one of these that is a little softer that talks about changeability but still gives you vocabulary.

[music]

0:53:11 HR: It's also very, very important that these are done by and through somebody that knows how to work with these things. That's why every tool we've talked about... And actually, the only tools that the three of us happen to use are tools that are restricted that actually require some expertise, some thoughts, some sensitivity. They go to some deep places. And so, this isn't something that you just take on the internet, they need some explanation and some discussion of, "This is what it means, this is what it doesn't mean." And never, never, never do these things if you don't have the time and aren't willing to give it the time to actually inhale it and learn it, and then learn how to pivot to, "So what? Now, what? Now, what do we do?"

0:53:53 KL: Fierce nodding going around the table.

[laughter]

0:53:56 RL: A lot of the negative perceptions that people have of various tools... I'll just say it straight up. A lot of it just comes from bad facilitation. It could be poorly done in terms of time or it was just bad facilitation, and people walk...

0:54:06 HR: They turn it into a game.

0:54:08 RL: Yeah, turn it into a game, people walked away with false impressions, they turned the theory into something that really wasn't meant to be. I'll only add one other and it's a version of the right time versus wrong time. When it's a crisis that's been going on for a long time, there's just a lot of emotional stuff that gets built up. The walls get built up really, really, really high, and everything that people hear is through the lens of a long time of emotional disturbance. And so, the rationality

and objectivity of what you're presenting to them gets translated through the subjective feelings I have about the project, the team, the leader, the person I'm working with. I really can't see reality straight through this subjective baggage and that's...

0:55:00 KL: "We've moved past that. I may not trust what I'm hearing from you now."

0:55:03 HR: Absolutely.

0:55:03 KL: "I never trust what you say because you always lie and you have been for the entire project or whatever," right?

0:55:08 RL: Yeah.

0:55:09 KL: Okay.

0:55:09 RL: And all I'm looking for is more evidence to just, "Okay, fine. Now I know your label, but now I know what the label means." And now I'm even more agitated because it has a real name, and I'm only willing to see the negativity behind that. Often, when I'm hearing there's a sense that there's been some sort of crisis that's precipitated. "Hey, we need to know each other better." I start going, "How long has this been going on?" I think they're at the point where all they want to do is air grievances.

0:55:34 KL: Yeah.

[music]

0:55:38 KL: It seems to be an honestly felt belief that you should have a protagonist to work with and you should have a skilled consultant to work with, just to make sure that people are understanding the use of the tool in a meaningful way. How could project managers get ahold of those kinds of services? Obviously, you guys provide them and others, and the tools.

0:56:00 HR: You need to be certified to actually get your hands on and use any of these tools. And so to get more information on the tool and certification, for MBTI, the publisher is CPP, they just recently changed their name to the MBTI Company, that's easy to remember, but CPP or the mbticompany.com.

0:56:22 KL: To get certified.

0:56:22 HR: To get certified...

[overlapping conversation]

0:56:23 KL: But I'm a PM and I'd like to have somebody come and work with my team.

0:56:26 HR: And so, one of the places you can come to learn about a number of these tools, but including the Pearman, and to access our trainers here is, oka-online.com. We have a blog that has lots of information about this and you can talk to us about trainers, and do you need a trainer and what would that look like? We're one source.

0:56:46 KL: Because I know MBTI you can get lots of these assessments online, and variations on the assessment, so we're not telling PMs to reach out and go find something online and just take them because again we're thinking you need somebody to walk you through it, at least at some level. So where can they go and get some SDI information?

0:57:02 RL: Yeah. So if they're looking for information on the tool itself, people listening to the podcast can go to the website, totalsdi.com, so it's just one word totalsdi.com. They can get information about the tool itself. Obviously they can go to my website...

0:57:18 KL: Which is?

0:57:18 RL: Raylinder.net. Obviously I'll have a description of the SDI and the other tools I use up on my website, and ways in which people can engage me. They'll see a blog, and tweets and so on.

0:57:30 KL: Do you also blog?

0:57:31 RL: Not as frequently as I probably should. But yes, I do. Again, the plug for the tool, the SDI tool, totalsdi.com where people can learn more about the tools and what it does.

0:57:40 KL: Excellent. Thank you. And David?

0:57:41 DC: Sure. So, Impact, the organization I'm a part of that publishes the tool and that's Impact International. So you can go to impactinternational.com to learn more about the model, learn more about the tool, also get access of course to our organization from a facilitation and a consultancy standpoint...

0:57:56 KL: So if I need help and I want use it?

0:57:58 DC: And you want help. And you can also of course, for certification go through OKA.

0:58:05 KL: So I'm going to highlight that real quick back with you, Hile. So your organization will do both working with teams and individuals in consulting, but you also are a certifying or you're a training organization to create certified users of the tools...

0:58:18 HR: We're unique in that way. We have a training center, we do a lot of work online and we have a physical training center here in Fairfax, Virginia, where people come to us and we train trainers; but separate from that we are also a collection of consultants and trainers that go out into the world to actually work with end clients, individually, and groups, and teams.

[music]

0:58:39 KL: I highly encourage you to look further into these resources and tools and explore some of the many more that are available. Also, you might check out podcast number 40, titled "Team Work", we have more there to say. And stay tuned for a second episode of Psychometrics where we make it real and discuss interventions in real teams, what's worked and what hasn't. Special thanks to my guests, David Cooper, Ray Linder and Hile Rutledge.

59. Psychometrics_ Myers-Briggs and Beyond

0:59:05 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.

0:59:18 KL: PMPs who've listened to the complete podcast may submit a PDU claim, one PDU, in the Talent Triangle Strategic with the Project Management Institute's CCR system. Use provider code 4634 and the title "PMPOV0059 Psychometrics: Myers-Briggs and Beyond". You can also use the PDU claim code 4634CUO4SM. Visit our Facebook page, PM Point of View, to comment and to listen to more episodes and get the transcripts. Leave comments on the projectmanagement.com portal, I like to read those. Evaluate us on iTunes and of course, you may contact me directly on LinkedIn. I'm your INTJ, intuitive thinking judgmental introverted host Kendall Lott and as always, know thyself, keep it in scope and get it done.

1:00:07 Announcer: This has been a Final Milestone Production sponsored by M Powered Strategies.