61. Brown, Mills, & Brownlee

Authors Part II: The Strategic Project Manager

Kendall Lott: Hey PM Point of View listeners - I have another podcast recommendation for pleasure, learning, and PDU's: Manage This – the podcast by project managers for project managers by Velociteach, hosted by the charming Nick Walker and the training expert Bill Yates. Twice a month they hit you with a podcast featuring interesting guests, and tackling the tough issues of project management.

A fun note: I'll be a guest on their April 16 release, episode number 79, talking about PM For Change and the Project Management Day of Service (PMDoS). So check it out on any of your favorite pod catchers or at Velociteach dot com.

MUSIC

Gregg Brown: Project managers who are let go from their jobs because of a performance issue or something, they're not let go because they don't know how to do a Gantt Chart. Nine times out of 10 the complaints people have about project managers are because they don't like them. or they don't know how to get things done. It comes all down to their leadership capability.

Kendall: The most important skill a PM must project is leadership. A good PM is a master of the soft skills that keep the team on track.

April Mills: The truly impactful transformations require a paradigm shift to where what I thought was true is no longer true, and what I know to be true today, is not reinforced by what I see everyone else doing.

Kendall: Change is hard and if it's going to be meaningful and sustained you might start out as a lone wolf, but if you position yourself carefully sensing the environment, you can gather a pack and be at the apex of the changes that will make all the difference.

Dana Brownlee: The number one question I would get from audiences, irrespective of my topic, they would always ask me, but Dana, how do I implement that if my boss is the problem?

Kendall: We've all had to work with difficult bosses, and as a messenger from the direct interface with teams, it's the project manager who often has to do some fancy dancing to keep those at the top in touch with the realities on the ground.

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.

Kendall: This is the second episode in my Authors series. This time, the theme is how PMs can

affect and influence the overall strategy and effectiveness of the organization. As the role of the project manager is evolving, we are expected to take a broader strategic view of where our projects fit into the organization. We need to be able to communicate our ideas and suggestions to the leaders as well as our peers. Not as easy as it sounds. Listen through the end of this episode to hear a list of all the categories of bad bosses. One thing that you will hear repeatedly in this episode, and in so many other episodes as well, is the importance of the soft skills, the people skills. But don't roll your eyes. It's a business requirement. Because this is about influence, folks. Engaging your team and working towards changes that are sustainable. Oh, bonus. These are the skills that big data and AI won't replace, at least not for a long time.

With a background in project management and change management, Gregg Brown is a best-selling author, inspiring speaker, and award-winning expert in the fields of leadership, resilience, and change. I wanted to talk to him about his latest book, Ready, Set, Change Again: Take Control of Change before it takes Control of You. In it, he calls out many aspects of change for PMs, and one key one is to start by setting expectations, even to, the powerful... You know you should, and you know you don't do it enough. Well listen up to his approach.

KL: What is this change of which you speak?

GB: Well, I think the biggest issue is that traditionally, the PM discipline has been focused on completing deliverables. Deliverables get done, the project gets completed. If you look at the evolution of project management, over the last, I'd say 10 years, there is more and more requirement, of project managers to be strategic in their thinking, to think of their projects as change initiatives because projects by definition are change initiatives, and they're also required to have a more thorough understanding of the sustainment piece. So while it is... Yes, I need to get this widget completed….It's very rare that you hear of requirements now that don't require the project manager to really think about if we're at Part B of our project management plan, how am I going to build capacity for the future when the project goes away, how do I build people's capabilities so whatever change initiative and project I'm working on is sustainable?

And that sustainability factor I think is that big change that we've seen in the PM discipline. Because you don't see any job descriptions today that say "We want a project manager that is very siloed in their thinking, that can't think out of the box." We want people who think big. It's not a lower level discipline...

KL: You're suggesting that the industry has moved to an emphasis on the sustainability, the ongoing-ness of things.

GB: There's the people aspect of figuring out, how to lead your team from A to B. From initiating the project to closing it off. And then we also have the issue of how to keep them actually engaged in that whole process because most people are doing projects off the side of their desks. They're not doing it as their main primary job, such as a project manager might be doing.

And the sustainability factor involves the PM liaising with sometimes hundreds of people... And we know in PMBOK®, and the research that when we're in major implementation mode we're spending 60-70 sometimes 80 percent of our time communicating and managing expectations upwards and downwards. And we're doing this in the context of often less resources. So there's the pressure to be more efficient as well.

You can teach anybody to do a project plan. It's much more difficult to teach people how to lead a team from A to B, and engage people in a project that is often seen as added work to everybody else in the organization.

KL: So given that that's what we face, what is that you actually suggest they tackle? What are some, I don't know, do you have tips? Do you have a framework for what they must engage in?…What's the lesson for our pms??

GB: Well, I think there's a few different things that they need to engage in. I think number one, and we talk about this a lot in project management and people are taught it, and yet I'm not sure in my experience, how many people actually do it well, which is managing expectations.

So, by managing expectations I mean everything from initiating a project through to closing it off, in addition to all the change requests that tend to come in. Often we as PMs, a change comes from on high, and we go... "Okay, yeah, I'll do it." And we may not analyze it against the triple constraint, may not look at it at the risk and what we forget is that we may have to do it because the vice president is asking us to do it, but there's no one above us who does not want to be informed of the impact, and I think PMs need to get better at informing people of impact of decisions and getting their approval before we step into it. Because then scope creep happens if we don't do that, and we preach that. And yet when we're under pressure, I think it's harder to do.

KL: How do you get scope creep out of that? Is it simply because they end up making changes to scope without approval, and that locks people into to new paths or ….?

GB: Absolutely. You know, unmanaged change is really scope creep.

(08:15) If you're in a complex project, a Vice President might make a request to you, thinking that it's nothing and the impact is nothing, and yet the impact is huge, but you feel like... Oh, I just have to say yes because he said it to me.

Well, maybe I do you have to say yes, but the Vice President, will want to know if there's an impact, that's going to create an issue and the client or sponsor whoever you're doing it for, because it may be somebody different, also needs to be informed.

KL: So this takes back to a very old situation for many knowledge workers, which is speaking truth to power. So do you have tips around that impact? You talked about it being a thing… I'm thinking data might help or at least… Or is it knowing the personality of the people you're engaging with?

GB: So I think it's a combination of things. I think it's about knowing what you're going to say and how to say it in a way that the person can hear us. Some of the language that I use and I encourage people to use is saying... Like let's say it's someone higher up than you, is saying. "Hey, I can do that...Give me five minutes or an hour, or however long it's going to take... for me to analyze the impact and get back to you just to make sure it's okay."

And if you use language like that, "Yes, I can do it, but let me just check on the impact and circle back…" I guarantee the person above you will value you even more because you are showing that you are thinking at a strategic level, instead of doing task-based project management.

KL That's one aspect, managing expectations. What else have you got for us?

GB: Well, I think the other thing is, is to manage what I call false positivity.

KL: You want us to be happy, what's wrong?

GB: No, That's not what it's about. So, a principal of change is this: we react to change differently that's our idea and that we agree with versus change that we disagree with that is imposed upon us. Or that comes from someone that we don't like.

So, nine times out of 10, a PMI will say, "I'm just going to tell them the benefits of this, and then they'll get on board," and I'm like, "Well benefits only go so far if it's going to be extra work for me, or the impact on me as negative. You can tell me the sun's going to shine and the lollipops are going to fly from rainbows, and it's not going to make me buy into your project." So, false positivity is really about putting a positive spin on a bad situation.

So I think the thing is that we want to look at is what is positive about this, but also what's the negative... And not being afraid to talk about the negative. What's good for you, Kendall, might not be good for me. So you can tell me how great everything is, but if there's a negative impact on me we're going to have a different conversation and having that dialogue. And that takes skill and it doesn't mean you have to problem solve everything. And this is the challenge for every PM that I know. Every project manager is a great problem solver and guess what, we can't solve everybody's problems. Sometimes just listening and acknowledging what's going on for the person can move them down the path of change. Otherwise they just keep repeating themselves.

KL: Your approach in teaching how to lead without authority, it seems that these are elements of that. That you're holding this basket of… I have this project with team members, and I'm engaging with these stakeholders possibly and sustainability. How do I do it when I don't own all of the problems? I don't own all of the resources. I don't own all of the impacts?

GB: For me, what it really comes down to is, and this has nothing to do with personality, it's your ability to influence people. So building your influence skills, and by influence skills, I mean looking at whatever your target market is, your user audience or your end user or your stakeholder group, whether it's a population that you have to influence, or whether it's an individual, is getting into the mind of the other person and answering the question, "What do they need to know to say yes to this?

(12:45) So for example, you and I could go into a meeting together. You have your mandate. I have my mandate. What'll often happen is we'll have these competing mandates, and we end up like two fists bumping against each other, saying, "I want you to do this," and I'm like, "I want you to do that!" Whereas, when we're looking at influence, we're really talking about seeking agreement and bringing these sort of two hands together, not as fists, but as interlinked fingers, to come to agreement around what the buy-in is or what the process is, and so on. It doesn't mean you need to shift from your mandates, because you do have your mandate to get this project done. But using your influence goes is the key piece.

KL: Right at the beginning, you talked about... We don't take enough time to approach this side, so maybe they don't have enough skill in some of it, we don't get enough training in it... And I took a

note there because as soon as you went to time, I thought, "Well now, it's become a project management problem." If we have these tools and these methods that could be something that could be planned for.

GB: They need to plan the sales process, and by sales, I mean the buy-in, the understanding, the engagement, the getting into the mind of the other person, what do they need to know? And if you answer that question, "What do they need to know?" from when you're initiating and planning it and in executing often you're managing expectations. You're always going, "What do they need to know here because of the impact here, what do they need to know here because of the impact here? What does my boss needs to know about this? What about the sponsor?" You know, "I need more resources over here. What do they need to know about that? What does this project resource need to know about the dependency that's coming after them so they're going to do their job better?"

And to me, if you ask you "what is that what do they need to know…"… Building that time in, not just from a Gannt chart dependency perspective, like getting into the task-based piece. "What do they need to know to do this, what do they need to know to say yes to this?" And I think... That's helped me and many folks I know over the years.

KL: Should they be focusing on…some aspects of this are going to require more buy-in and therefore I need to think it through …

GB: Yes.

KL: It's almost like…I mean, I hate to say this, it's like we need a Buy-in Register…

GB: Sure!

KL: Since we have a Risk Register and a Benefits Register. And a Scope Register, essentially.

GB: Yeah!

KL: It's like, Okay, so this step of the milestone is going to take so much more time for the buy-in and this one of course will be obvious.

GB: Well, yeah, yeah.

KL: Oh god, did I just invent a new tool for project managers, have to go learn? Oh, no…

GB: Oh no, but I think it's this... I think we can take it, so for example, when we talk about buy-in, what's that mean, you know, in each project that might look different. Buy-in might mean this person wants to contribute to this part of the project. Buy-in for your end user might mean they want to be an early tester for this. Buy-in for your sponsor might mean you're going to get quick sign-off some things that you've escalated. It's really articulating what do I want people to be able to think, feel, or do differently at the end of this project from the beginning of the project? And we tend to label people who don't buy into our project right away as, "Oh they're being negative. They don't understand or they don't want to do it." And I think a key tip I give PMs frequently, is don't label. Get rid of the label and look at negativity as skepticism.

KL: So call it a legitimate complaint.

GB: Absolutely, they might be. And what's legitimate to you might not be legitimate to me, but yet if I'm leading this I'd better be prepared to listen to you, and they might just need to get their questions answered. Sometimes we just need to have that space to get our questions answered and then we will get on board.

KL What's coming next? We've thrown around some words and almost all of these areas, we talk about artificial intelligence, and also the role of big data. How do you see these playing out for project managers?

GB: I think we are going to see a much more rapid fire, so to speak, of data coming at you and decision-making requirements as happening quicker. It's all about rapidness, right? And being more efficient with how we deal with things and I think, because technology is such a driver of change…and technology is a driver of project management too... There's going to be more data collection, there's going to be more automation of repetitive tasks, there's going to be that ability to make decisions with immediate access to real-time in-depth information and your stakeholders or customers or clients are going to want immediate access to this information. And, this is the challenge for all of us, and projects and change issues, people are going to want a more tailored approach to their needs.

(17:56) Ten years ago, nobody knew what a dashboard was. Now people want to be able to hit a button and see where things are. The red-green-yellow show stopper…where are we at??

KL: The decision-making, which we think of as a person, might be what moves away. It's the management side of this, that becomes a... taken away.

GB: So if we take a step out of project management for a second, if we think about this management as a whole is very much a reactive role. You're managing data, it's very present-focused, it's very technical. The corollary to that is the leadership aspect, which is the proactive piece. Every project manager's a leader, regardless of whatever formal job title they have. Project managers who are let go from their jobs because of a performance issue or something, whatever, it's labeled as…they're not let go because they don't know how to do a Gantt Chart. Like it's rare, you know?

Nine times out of 10, the complaints people have about project managers are because they don't like them or they're jerks, or they don't know how to get things done. It comes all down to their leadership capability. And their requirement as a PM, which is to be as a leader, is to be foreshadowing, to look forward to do clear decision-making based on analysis of future risks and so on. That leadership aspect is really to me where the project management discipline's going, Yes there still will be a requirement for that traditional PM focus of being in the here and now, and managing the projects. Stay on budget, on time. I think that's not going away. However I do agree some of that will end up being automated, more than it is now.

And the leadership aspect, because the strategic capability requirement of a project manager has been put on us over the last 10 or 12 years, which means getting out of our comfort zones. Instead of just looking down at our project, looking up at the organization and seeing how we fit, how our project fits.

KL: Again, it's the leadership aspect of the project manager's job that is most important, and that's really about 75% soft skills. It means engaging your team and communicating effectively with your leaders. PMs today have to operate at the higher strategic level. You can't just focus on the task-based management of your own project.

Look for Gregg's website, Change-Ready Leadership, at GreggBrown.CA. That's g-r-e-g-g (Gregg) Brown-dot-C-A. There you will find a wealth of blogs and videos, information about his workshops, and also a link to his book <u>Ready Set Change…Again</u>, which is available on Amazon.

(21:00) KL: By day. April Mills is the Director of IT transformation at Intel. By night, she's an author, speaker, engineer and founder of Engine for Change, inspiring leaders, and change agents around the globe. And she has a list of actions for you to take to promote and protect the change that you may find yourself leading. Grab a pen.

April Mills: I work with organizations to help them accelerate their rate of change and get more people involved and more excited about the changes they're trying to make.

KL: Accelerate the rate of change. That implies that you are measuring change over time. How is that approached, starting with the measurement?

AM: Often, what I find is that folks have an idea of how long a change should take in their head. That initial project plan: this is a three-year change, this is a five-year change…And what I partner with them to do is to understand how can they actually accelerate that timeline because there's always a line of changes waiting behind those that still need to happen.

KL: The change means adoption of something new?

AM: It can mean building something new, it can mean the adoption of something new. It's really just how fast the shift happens. The shift sometimes has the build piece in it, sometimes just adoption. And it also includes sustainment.

KL: When is sustainment harder in the types of change that you've had to face.

AM: So usually when I encounter really tough sustainment challenges, it's because the initial plan didn't even assume anything around sustainment. It was much, the Field of Dreams, concept. If you build it, they will come.

KL: Is it an emotional issue for people or is it about their knowledge, what they need to know in the new change when getting to sustainment.

AM: So I'd say it's a little bit of both. So sometimes there's an aspect of... Do I understand how to have the right amount of budget, have the right upon of resources to sustain it. Then there's also the mindset around the value of sustainment and what you can actually do in that phase to actually continue to improve without maybe having to transform again.Transformations are challenging and expensive. You'd rather evolve, than have to leap forward, but that's what sustainment can give you is that ability to make those subtle shifts.

KL: You really hit something there. We hear a lot about the evolution versus revolution. Are you able to kind of define that in some way?

AM: Yeah, I think the major thing I use to differentiate is, "Do I need a paradigm shift in any of my thinking or behaviors in order to achieve this new change?" Many methods have spread around organizations because you can get some benefit out of them, without necessarily having to have a paradigm shift. The truly impactful competitive advantage-sustaining transformations require a paradigm shift to where... What I thought was true is no longer true, and what I know to be true today, is not reinforced by what I see everyone else doing.

And those are much harder to achieve and sustain because you're different, you are outside of the normal. There's no case study to point to, you're on that leading edge.

KL: You have written a book, Everyone is a Change Agent. This book is very interesting because you're talking about how people themselves get to engage, and change. What caused you to write it?

AM: Yeah, and so what I found in organizations is that too often, people with great ideas were waiting for somebody somewhere to find them and bless their good idea. And as they sat and waited, they saw the potential of that idea not being realized. They got frustrated with the leaders who lacked the insight to see the importance of this change they wanted, and their motivation and participation in the organization decreased. And as I was watching this, and I'll admit, potentially being one of these people...I went searching in business books for a strategy. And what I found in book after book after book was the presumption that the person reading the book was the CEO or at worst a senior leader, and they were speaking to a very narrow band of the organization. And I realized that there was a big gap in helping organizations and the people within them realize that it's not the job of the senior leader to make these changes happen. We all have a role to play, but we have to play that role in a way where we can be successful within the organization. And that's what the book speaks to is one believing in yourself and then structuring your efforts in a way where you can get them through an organization without having to be in charge.

KL: So our call to action here is literally everyone is a change agent, you don't have to wait to say, "I have the authority to do," but there's engagement you can have specifically when you see something can be done better, and it's about the benefit ultimately of some sort of advantage… creating the competitive advantage.

AM: Yeah, and I'd expand that out... because it's not just competitive advantage. Sometimes there's lagging behaviors, compared to industry standard, which are hurting revenue, increasing costs, and someone at a level where they're working with a process is more aware of that than a senior leader. And I've seen folks in those situations wait years, hoping the senior leader would finally notice their pain. And waiting on a few senior leaders to change all that is a fool's errand. I'd rather have people saying, "Here's what I can do to make this company run better," which then protects their job, increases the business success, and gets them some satisfaction of having agency in the process.

KL: And you've really added to a big picture that we're seeing here is thinking of people in their work and their projects as value-producing, not just showing up for work that projects are investments.

When we talk about employee engagement, where people are "aligned to the strategy," – the idea that they know what we need to be achieving, and how we can do it better. Trusting your teams allowing them to engage… It's not just for the senior leaders to be picking things, figuring out things, and directing things. It actually comes from everybody who wants to be involved in work that's more effective if not meaningful.

AM: Yeah, and what I found is when folks would try and take action from where they were, they had a tendency to mimic the behaviors that senior leaders use. There's a lot of telling, controlling, demanding… and those don't work for most senior leaders, although we have this notion that they do. But they really don't work when you're a junior employee, trying to boss the other organizations around to obey you. And that's what the book is meant to offer, is a way where you can use an influence-based, a passion-based, a personal-based approach to unlock that cooperation and potential in others around you.

KL: You talk about seven change essentials that you kind of distributed across kind of a four-stage life cycle: Discovery, Plan, Act and Lead. And one of the very first essential that you noted was "Drive change, not people." So that seems to speak a lot to the... "You have to be an influencer and not directing."

AM: So driving change is about choosing a change for yourself, taking action and clearing the obstacles for others to join you. It's contrasted against what most people see, is driving people where we use coercion, threats, rewards to compel others to change. And it's very powerful, and I've seen a huge difference, as folks have just adopted this concept of driving change. If you say, "Well, I'm going to order everybody to go to this training class." What we'd see is six months later, maybe 60% of people have gone. That's probably on the high end. But if somebody were to change that around and say, "I've attended this training class, here's why it's powerful for me, and I encourage all of you to attend." Chances are good you'll get high rates of participation much faster.

KL: Now, this is what you call the discovery, and I'm using the word phase, of taking ownership as a change agent. Tell me what you meant by discovery.

AM: I think the first portion of anyone's change journey is looking at the world with fresh eyes. As I've met people over the years, and when I start working with them, they don't see the potential of the environment around them, they see all the things it can't do and can't be, and can't happen. And as they raise binoculars to look out with driving change eyes instead of driving people eyes, you see a whole new potential in your organization to partner with you to achieve things.

KL: Another essential is Create and Maintain Change Buffers. What are change buffers?

AM: Just like a project buffer protects what you care about with the due date, or a scope buffer in Agile protects delivery with adjustments there. We actually buffered the change from the status quo to protect the change behavior to the changed process that changed thinking that changed people until the change is strong enough to withstand the status quo.

So if anyone's ever seen a group of people go off to a training class which was very impactful, for them only to return to work and become the same people, they were before they left, they're seeing the lack of a change buffer.

(32:07) KL: How do you have one to describe what one would look like.

AM: So there's a few different types. The first is a personal change buffer, which is if you're going to be different than the status quo, you're going to have good days and you're going to have bad days. And on the days where the day-to-day behaviors of everyone else are dragging on you and you don't think you can go on, you're going to want that friend to reach out to, that encourages you to keep going, that tells you you're not crazy that...tells you, it's worth it. You'll find that person and they'll help you and they'll give you strength.

The next is a leadership buffer. And many people have worked successfully under this, which is... I've got a great boss, and I go get things done, and I'm different than everybody else, but the boss says, "Leave April alone, she knows what she's doing," and I get some freedom.

That's a great strategy until the boss leaves. And then the buffer collapses. And some organizations who've had amazing results reset, because the change was only protected by the leader.

KL: That's a risk mitigation on your change plan.

AM: Yeah, so some of that. But the next phase of a change buffer or a different type of change buffer, is also a Policy Buffer... Where you actually change the policies of the organization to make your change the new status quo or an approved alternative, to the status quo. So I used to work in government for the US Navy, and we wrote everything down. So you could find the chapter and verse of the policy and modify it to say, "In most cases, do A... But if this do B." And then if you were somebody who was doing B when somebody came to you, and said, "Who told you you could do that?" You could say, "Manual such-and-such, paragraph so and so, says B is approved."

And then the last one is a Celebration Buffer. Too often, in organizations, we wait for the project to be done before we'll celebrate; we wait for the big delivery before we actually high-five. And another way of keeping a change going is to create space for people to keep trying, by having small repeatable celebrations. Most organizations are starved for appreciation. So feeding the Celebration Buffer gives space and confidence to the folks that are changing with you.

KL: Other change essentials that you talk about in the book, and our PMs can read it, is "Set a concrete goal." "Map the terrain." "Challenge assumptions." And "Focus on sustainment." And these all map back into your Discovery, Plan, Act and Lead. But in there, I found a couple of things that were very new to me. Your concept of finding settlers…

AM: Yeah in organizations there's a challenge with folks where they think they are the first person to ever have discovered a change. And too often I've seen them appear in a place in an organization, as though it's a green field. And they want to plant their flag, with their change, and they usually plant it straight through somebody else's foot.

So I've met engineers who said, "You know, we really need to improve this, about recruiting," and then just start a recruiting program instead of partnering with HR. So then you find the team that's responsible for recruiting after you've spent six months figuring out what you could do for recruiting. And they don't really appreciate the help. And so, so if you check for settlers first, because one, you find partners who likely are just as frustrated as you with whatever you're trying to change or just as excited about the opportunity. And two, you can learn a lot about who's tried

before.

KL: You give a list of tactics. And I thought some of them were very, very interesting. One of your very first ones that I found was "Bury the Corpse." Tell us a little bit about that as a tactic.

AM: So, in most organizations, you have meetings that are on auto pilot in the sense of when you set up a recurring series of meetings, usually in Outlook, it defaults to saying "This, never ends." And most people don't change that default setting. So, you'll have efforts that started months ago, years ago, even, that any change value that might have been achieved is usually been lost. Now it's just a meeting for a meeting's sake.

(36:47) And I find organizations where people say, "I have no time to take on these changes," and I ask them "Well how many corpses do you have on your calendar?" And so, cancelling a recurring meeting, and waiting to see if anybody notices, is a great prompt to the system to find out, is there still any life in this?

KL: You must change perspectives and dissolve resistance. Tell me what you meant by that tactic.

AM: Rather than talking at each other around an issue where we have different perspectives, it's to actually put it up on a board together, and address it as a team. We tend to do point-counterpoint, conversations. "I think this is a good idea." "No, I think this is a good idea."

And we spend weeks or months having these point-counterpoints. So you can use this Change Perspectives and Dissolve Resistance method to say, "Let's look at this together. There are positives and negatives of the change and there are positives and negatives of not changing, and I really want to understand all of our perspectives." Get them up together on a board and then I, if I'm the change leader, I'm going to spend some time trying to figure out how to find a win-win. And I welcome the others who gave me their perspectives to join me in that. I don't require them but I welcome them to join me.

(38:12) And you can usually dissolve a lot of resistance to the change just by the willingness to see it through their eyes. But also not having the "Well let me put my perspective down and go to yours." But, "Let's blend ours so that we all know something more."

KL: It's a form of coalition building. But around the ideas that you're wrestling with.

AM: Yup.

KL: How important is it to measure anything happening in this change? Because it strikes me that it in itself is a project. The project is called change this thing here.

AM: When I work with folks who are taking on changes, the more nebulous and abstract the change is, the longer their toiling away will be without much to show for it. But the more tangible and specific they can get, of what they're going after, even if it's more of something and less of something instead of an exact thing. The clearer they are as they progress. And so that's what really helps you figure out, "Well, how would we measure it?"

(39:19) When I find complex measurement systems in organizations, it's because they're hoping the

measurement creates concrete clarity. And I would say that once you have concrete clarity the measurement falls out and it's obvious.

KL: Change management versus Change implementation. Compare and contrast.

AM: Oh, this is a passion area of mine. And a huge frustration. And I'd actually expand it out past just change, to a specific change which is often on most senior leaders' minds, which is strategy implementation. There's a wealth of classes and books around choosing a strategy. And I'd argue it's also very easy for people to pick a change they want. What is almost a wasteland of a lack of information is in the implementation, when it comes to, "How do you transform that thinking?" especially if it's on the other side of a paradigm shift, into actual instantiation in the organization. And that's really where my passion area is. I love ideas, but I love ideas in practice. The power isn't in the idea, it's in getting folks using the idea towards that greater good thereafter.

KL: So PMs, you can be a driver of change in your organization. But don't act without laying the ground work first. Approach it as a project. Your most important tools are the soft skills. Deploy them strategically setting up buffers and allies and you will be well positioned for success. You can find information about April's book, Everyone is a Change Agent: A Guide to the Change Agent Essentials, along with her blog videos, booklets and more on her website, engine-for- change.com.

KL: Remember Charles Chandler and Organizational Effectiveness, PM Point of View #57? Well he's presenting at this year's University of Maryland Project Management Center for Excellence Symposium. Tackling the issue of Organizational Effectiveness as breaking from the constraints of traditional management practices, he'll be live at the symposium. If you are in the DC metro area, make it a date. It's inexpensive, and very accessible. The UMD PM Symposium, "Turning Knowledge into Practice," May 9th &-10th, 2019. Google it, sign up, learn lots, get PDUs. Back to our show.

KL: Corporate trainer and keynote speaker, Dana Brownlee is the founder of Professionalism Matters. She works with teams & organizations to bring them to new levels of performance. She also happens to be the highest ranked Influencer in the Leadership category on the projectmanagement.com portal. This is her second appearance on PM Point of View (check out episode 29 – Influencers Part I.) For this episode, we will talk about her recently published book The Unwritten Rules of Managing Up: Project Management Techniques from the Trenches.

KL: What made you write this?

Dana Brownlee: I have been speaking at PMI Global congresses. I've been to Milan, and Berlin and just all over with private events, public events. And the number one question I would get from audiences, irrespective of my topic, they would always ask me, "But Dana how do I implement that if my boss is the problem?" Managing up is critical and there are things that you can do and there is help out there. So I'm really grateful to be able to share today.

KL: What does it mean to say it's a difficult boss? Just generally?

DB: For the purposes of my book, it's that boss that just seems to be the barrier, in the way. When

you have that feeling like, "Well gosh, if he wasn't here, if he just didn't show up to the meeting, we'd be able to make progress." So that's kind of what I'm talking about. It's the boss that's kind of getting in their own way, or they're getting in your way, or the projects way, so they're really becoming a net negative instead of a net positive. And there are different ways that that can happen, and most of the time it's not intentional. Most of these people are well-intentioned. But we all have flaws and weaknesses and so in the book, I kind of diagnose six different types and talk about techniques for trying to manage through some of those.

KL: I was intrigued when I was reading through the book, about the different types of problematic bosses there could be... And I looked at these six, and I thought, "Oh yeah, I was like that yesterday and then I... Yeah, that was last year. Oh, I remember this time earlier this summer." Yeah, so it could also be lenses on how we act sometimes.

DB: I'm so glad that you said that because this is not monolithic. We all probably can relate to some of these characteristics. And one of the reasons why I felt like it was fairly easy for me to write the book or speak to some of this is I can relate to it. I have been the meddlesome micro-manager. So, we're not castigating these people and saying they're horrible, mean and we're perfect. We can all relate to some of these characteristics.

KL: I do want to give people a flavor of what you're identifying that could be difficult for PMs. And I can't go without saying, caveat and you as PMs listening to this, how you might be engaging with your teams as well, particularly micromanagement because we're trained in this whole decomposition. Take it down to the bottom level and monitor.

(45:14) So the meddlesome micro-manager: "You don't mind me hovering over you, I bet you're doing a great job. By the way, can you give me the status update?" I think we've probably all experienced that. What was the biggest single pain, you heard around that?

DB: Well, really, it's multi-factorial, it's not just the nuisance and the stress, but really when bosses micro-manage, it sends the signal that I don't trust you. I don't think you're doing a great job. So it becomes a vicious cycle. So because you're feeling this distrust then maybe you start second-guessing yourself, then there's this other element that came across really loud and clear in the survey was just the efficiency drain that it was. So many people said, "Hey I could get so much more work done if I didn't have to waste so much time creating all these updates. Or stopping in the hall way to entertain these 10-minute discussions that turn into 20 minute discussions. Just kind of let me do it and I can actually get the work done."

KL: So, Clueless Chameleon. This is the one that doesn't know what they're looking for, but they're ready to make sure the other person is responsible when they haven't figured it out still.

DB: Definitely. And there are a few different flavors of the Clueless Chameleon. So this might be the one who told you one thing on Monday, but then tells you something completely different on Thursday. Or they can't really remember what they told you or they had a thought on a flight and they forgot to tell you, but then in the meeting, they're asking you for something that they forgot to assign to you or they just don't really know what it is they want. They might say, "Hey, I want you to develop a business plan." And that's really kind of vague. And you go back and pull together what you think the right thing is, and come to find out it's not at all what they were looking for.

(47:10) And again, there is responsibility on behalf of the subordinate. Those are some of the techniques we talk about, about asking those clarifying questions. And the reason why the clarifying questions are so critical is it helps them think through what they really want. Because the dirty little secret is a lot of times they don't really know.

KL: Is it about them not knowing or not communicating well?

DB: It's both. And one of the techniques that I talk about in one of my classes is the three magic questions of delegation, and one of them is kind of repeating it back. One of them is getting very, very specific about what the deliverable will look like. And then the third question is, what are the first three things you're going to do to start working on this task? And I recommend those to try to close that gap for the leader who isn't terribly clear.

KL: Wishful Thinkers. So this sounded, the way you framed it, is boil the ocean and solve world peace while you're at it. The Wishful Thinker, is this the one that's just saying "And do other stuff as well." or... where did that come from?

DB: This came certainly from personal experience, unfortunately, but from other feedback as well. But this is the one that just has rose colored glasses on. They just have no clue how much work they have just asked you to do. And I vividly remember being a strategy consultant at a top Fortune 100 company, and sitting there with the client with my team, and our VP had flown in for this meeting to close the deal and he promised them that we were going to redesign their entire governance system, develop this whole e-commerce system, and he was like, "Oh yeah, we can get it done in two weeks. We can just knock that out." And I am sitting there thinking, "Us and what army of consultants are going to define an entire e-business governance system for them in two weeks?"

(49:05) He just had no clue of how much work was involved. And this is kind of what I meant before, when I say a lot of times they're well-intentioned. They don't mean to ask you to boil the ocean. But what tends to happen is hierarchically, as they get further and further removed from the day-to-day work, they just don't have their hands around what it really takes to get this deliverable completed.

KL: What I find interesting here, one of the questions for leaders is, that was thrown to me early as I started my own management training, was how do you get information that's helpful to you, to make these decisions to make requests to delegate? And then after that, the next question is, and how do you know that it's right? So a lot of leaders will look like they're asking the wrong thing, but it's actually because they don't have the right information, because of where they're getting it from, or who gave it to them.

DB: And that's why managing up is so important, because managing up is that subordinate proactively filling in those gaps. Saying, "Hey, Gary, I know you haven't interacted with the vendor quite as much. Let me just fill you in, you know, let me just give you some additional information." It still ultimately may be their decision. So we're not trying to usurp their authority, but that's one of the reasons why that managing up piece is so key.

KL: Well, we've got three more here. The Tornado almost looks like micro-management, but it looks more emotive to me.

DB: Yeah, I think we've all seen the Tornado, unfortunately. That's the bull in the china shop. That's the boss, when they come into the meeting everyone kind of clamps, shuts up and just nods, and... they just are a force of nature. They're intimidating, they're talking over people, don't have the best EQ in the world, and that can have devastating consequences. It's not just the morale, but it also can really stifle progress on the project. I mean, for most projects to be successful, we need to hear concerns, risk. We need people to be candid. And the tornado style just really kind of shuts all that down. No one's going to speak up, no one's going to question, no one's going to point out risk. And so it can have a significant negative impact on the project.

KL: The Naked Emperor. So I find this interesting, by the way, we have the micro manager which is someone who's really digging in on the tasks. The tornados is kind of emotive hear me roar. And the naked emperor, "I love the sound of my own voice, aren't my ideas brilliant?" which is… The world of ideas is all out there in their mind.

DB: Right right. This is the one that's chasing the new, shiny ball. And so they have these crazy kind of crack pot ideas, but they think they're brilliant! And they keep... you know, you're working on A, B and C. And they keep coming to you with D, E & F, and no one wants to burst their bubble, and say, "Maybe we shouldn't try to figure out how to turn peanut oil into jet fuel. Maybe it's not the best idea in the world, and it's not the best use of resources." They're also, can also be the genesis of a lot of projects that should never become projects.

People love to feel like planning is the first phase and it's not, it's initiating. Initiating is taking some time to vet that idea. To look at it and consider it. To look at the benefits and the cost and say, "Yeah well, it might sound like a cool idea, but is it really worth adding resources to it, and time etcetera… And the opportunity cost of what those resources will not be working on... Because they're working on this project or this idea?"

(53:00) So the naked Emperor could be really tricky because let's face it, I mean, who wants to burst their boss's bubble?

KL: On the other hand, I think we need them in that you probably want some genesis of projects from somewhere.

DB: Yeah, you want the innovation and the creativity, but the problem… and I'm so glad you mentioned that. See this is the difference: when someone's lower down hierarchically, they can be creative and innovative but every single word out of their mouth, doesn't turn into a project. So, I agree with you. You've got to find the balance. We want the innovation, the creativity, but we do want to have some sort of vetting process; we want to ensure that we're proceeding in a really tactical…well strategic manner by selecting the efforts that really are worthy, of our time.

KL: Then this one's a bit of a curve ball. The MIA boss. It's actually the one who's not in the way in the sense that they're not there creating a barrier.

DB: Well, the problem is they're not providing support. I mean let's be honest, a project sponsor or the boss or VP or executive whomever it is, that's a critical role. We need a project sponsor to support us to help when there's chaos or fire. A lot of times, we need that senior level person to authorize deliverables, to authorize moving beyond a certain milestone. Moving to the next phase. I've had many projects that ran over, mostly because we couldn't get the approval on the sign-off or

the reviews and a timely manner, from senior level people in the organization, because they were traveling, they were on vacation, they were just out of the office, they were telecommuting…they were MIA, basically.

(54:37) And so, it's difficult when you have a key member of the team who's not pulling their weight, who's not performing their function, and it makes it even trickier when it is your boss.

KL: Not to leave all the rest of our PMs out. Because I know some of you in the audience probably, or likely say, "I don't have those bad bosses; all my bosses are good." Perhaps even strong. Well it turns out... Dana has words for you as well. When we look in the book, we see managing up tips for the average to strong boss, because even if your boss works well that still means we have to think about how we manage up to techniques from the trenches, right?

DB: Yeah, and really what I wanted to try to do is dispel the myth that managing up is just about difficult bosses. Really, to me, the most effective managing up is when you do it consistently. You don't just wait until you have a bad boss to try to do it, but you're doing it, even with great bosses, so you're making that great boss even more effective.

One of my bosses said to me one day, he was like, "You know, the reason why I really appreciate you is, usually when I bump into somebody on my team, they're adding something to my plate, but whenever I bump into you, you're always taking something off my plate.

KL: Tip number six…

DB: Yeah, it's work in circles around other people; it's being proactive and thinking ahead, being strategic pointing out risk. Don't wait until the other shoe is going to drop. See the risk that's there and bring it to your boss and don't just bring them the risk, bring them some potential solutions, some other alternatives that they might want to consider. So those are the things that we're talking about when we talk about managing up with a great boss.

KL: We learn a lot about relationships as being important to manage stakeholders and needing to communicate. And in the Peace Corp, we learned "Relationship before task." But you talk about building relationships before you need them. That's got like a sense of authenticity almost.

DB: Absolutely. Relationships just really are truly the foundation for everything. And one of the mistakes that we tend to make is we don't tend to build that relationship until there's a crisis. And then guess what... That's not really a great context for building a relationship. So taking time to go out of your way to try to strategically build these authentic relationships over time is probably the most critical managing technique, there is.

(57:18) KL: Yeah, and I think we have to build techniques or systems for making sure we do that, that's what I have found. I almost have to think of... "How will I cause myself to be in situations where I have to build the relationships?" So it takes an effort and it's so hard.

DB: Once a week, go out of your way. Say you have a cafeteria situation at work…once a week, go out of your way to sit with a table of strangers, because that will force you to start to do that but I think you absolutely hit the nail on the head. It probably won't happen naturally. You have to be proactive about it, but the investment is so worth it.

KL: Dana's book, The Unwritten Rules of Managing Up: Project Management Techniques from the Trenches is now available on Amazon. Visit her website, professionalism dot com. There you'll find her blog, videos, and more information about her book. Also, I recommend that you check out her webinars and videos at ProjectManagement.com.

KL: This episode could have been called, "It Takes Effort and It's So Hard." Seriously, this is a call to action for all of us. Project managers are well-positioned to be a force for change. We can all have a hand in strengthening our organization, speaking up to our bosses, influencing our colleagues and changing the status quo to make a more effective organization.

I'd like to think my guests Gregg Brown, April Mills, and Dana Brownlee,

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.

KL: PMPs who've listened through this complete podcast may submit a PDU claim, one PDU, in the talent triangle "Leadership" with the Project Management Institute's CCR system. Use provider code 4634 and the title "PM POV 0061 Authors Part 2: The Strategic Project Manager. You can also use the PDU Claim Code 4634Z410HJ.

Be sure to stay tuned for next month's episode on Radical Performance, where you'll hear Brian Levinson and Alan Stein, 2 experts on sports performance and its application with executives and managers, talk about the preparation mindset, performance mindset and the need to practice performance moments.
.
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 host Kendall Lott, and until next time, influence you colleagues to listen to PM Point of View and to, "Keep it in scope and get it done!"