72. Teamraising

with Lucas Marino, Lisa DiTullio, Paul Pelletier

Lucas Marino: Being aware that the way you're talking to people, the way you're showing them appreciation, the way that you're asking them to move through your organization, all that matters because it's in the back of their head and they go to sleep at night. Am I excited about going to work tomorrow?

Lisa DiTullio: I think in today's world, it's no longer about leadership. (Yes, that's needed.) I actually think it's about human-ness.

Paul Pelletier: I think that each of us has a duty first to ourselves, to our co-workers to our families and yes, to our organizations, to act with integrity and to demonstrate courage in the face of incivility or injustice.

Kendall Lott: Team raising. Think about it. More than simply building a team, how about raising it to the next level? Getting those involved to be more mature? If you view organizations as families, then leaders are in the parenting role. And what do parents want for their children? They want them to get along, to be polite and civil. And most of all, they want them to realize their full potential.

But in today's office environment of increasing specialization, higher requirements for advanced knowledge at earlier stages in our careers, the cancel culture – rife among many teams – and the incessant demands of what Dr. Charles Chandler called, "efficiency-ism" (on our podcast, episode 57) we often feel stretched to the limit. Project managers have to deal with contentious stakeholders, rushed deadlines, over-extended schedules. As a result, we tend to focus more on the business imperatives, and brush over the human factor. This can lead to a hostile and dysfunctional work environment.

The most successful leaders bond with individuals on their team. They support and guide them in their efforts to succeed, and encourage the connections that hold the team together. In this episode, we speak with three guests: a former Lieutenant Commander of the Coast Guard, a PM consultant who focuses on the health care field, and the author of The Workplace Bullying Handbook.

Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

KL: Like parents, project leaders must take responsibility for modeling appropriate behavior, and nurturing prospective managers and leaders. Based on his experience in the US Coast Guard, Lucas Marino has very clear ideas about how organizations can and should cultivate those who exhibit potential from within their ranks. A systems engineer, project manager and educator, Lucas served

21 years in the Coast Guard. He now serves as the integrated logistics support manager and product support strategist for the Navy's Columbia submarine acquisition. Lucas was still a Lieutenant Commander in the Coast Guard when I met up with him at the sprawling Coast Guard Training Center in Yorktown.

Lucas Marino: This is kind of where it all started for me, in my Coast Guard career, was here at the training center, which is the Coast Guard's premier operational training center. So this base exists to develop both enlisted and officer competencies. The Coast Guard's amazing at giving you so many different experiences, like leadership experiences. That's one of the reasons why I think the military is so good at developing that leadership culture, is that by necessity, they force you into all these different roles. The focus is on giving you more responsibility rather than less, so they're motivating people to try and take the reins. And then once you do, they try to reward you.

LM (03:33): Any time you have an organization that develops its own leadership from the ground up, it's responsible for the leadership it develops. And so we've got this issue where if we don't invest or at least acknowledge that we're developing our own leadership in a structured way, we're kind of at the mercy of whatever it comes through the other side of the gate. And the military does a really good job of saying, "Alright you're gonna be allowed to promote or advance, once you demonstrate certain military leadership traits" that we try to capture on evaluations, which is just like any other employee evaluation system. Those evaluations are supposed to point out your strengths and weaknesses as a leader. And then the system is supposed to promote the most eligible leaders to leadership positions. You see a lot of that in industry as well, but what you don't see is a concerted effort to really focus on the development of the leadership traits, and those people as they come up through the chain.

LM (4:32): You have people that are doers, people at the tactical level, that are doing the work, getting the stuff done down on the deck plate. And then you have the progression to Manager, which is in the middle, that's the Operational Manager type. And then from there, you're hoping that you get strong enough candidates to become your strategic leaders.

KL: What's going on that causes them to become leaders? As opposed to the system, which is kind of vetting out the people at levels…

LM: Correct.

KL: …levels of management and leadership. Saying, "Oh, you only had so many of the qualities that we need, and you don't get to go." Or you do get to go. You passed through the screening.

LM: The organization, for its own survival and to the benefit of its own bottom line, should be intentionally developing leaders, right, especially if its structure is dependent on internal resourcing for leadership. Yeah, you want more intent, you want to make a concerted…

KL: Who wants it? You're saying as an organization?

LM: Yes, the organization, well and the member as well, as a person that is aspiring to progress though the chain, you have to be personally invested in developing as a leader. So that's where the personal responsibility comes in. We can't complain that we're not being promoted or advanced, if

we're also not taking the time and effort to developing into leaders, not just technicians. And we have a lot of people in the engineering world that…they just love being engineers. They love building…designing. You have some of those people that want to do that forever, they don't want to do anything more…Great. Be a doer. Then you get some people that want to progress into management, so those people that do want to progress, they should be focused on what skills do I need to learn as a doer to develop into a manager? So by the time I get to the point to be contending for a management position, I own those skills and I can demonstrate them and articulate them to the organization so that I become more attracted to them as a potential manager. And then, if you're lucky enough to be selected as a manager, you're not hitting the ground day one saying... Alright, what do I do now you're already somewhat prepared for the role.

KL (06:38): Is the Coast Guard itself designed that way you're saying? Is that typical of them, or is that what your observing systems have trouble with broadly?

LM: We focus pretty heavily on developing those leadership traits in people. In phases. So, you know, we break a career down into sections. Like junior officers, junior enlisted, and then you've got your mid-grade officers, your mid-grade enlisted, you've got senior officers and senior enlisted. And for each of those communities, you have a different focus. If you make chief petty officer in the Coast Guard, they send you to the Chief Petty Officers Academy. So you can learn the leadership traits expected of Chief Petty Officer. They don't wait two years to send you; they send you as soon as possible, so that as soon as you get those anchors on, as soon as you're promoted to Chief, you're performing to the minimum standard that they expect from the leadership perspective.

KL: So from an organizational perspective, your point is this a good design…?

LM: Yes.

KL (07:33): What is required from an organizational perspective? The Coast Guard does this very well.

LM: We do a good job of it.

KL: So, tell you what…reel off some of the good practices. What is it that they do that they focus on that's helpful?

LM: Yeah. So hey, if you want to progress to the next rank, these are the types of jobs you should be looking at. These are the responsibilities you should be taking. These are the extra responsibilities you'd be taking on that may not be related to your primary duties. Like, "Look at all these opportunities, these challenges disguised as opportunities, that you could be taking." So then when we go to do your evaluation, we can acknowledge the fact that you are an innovator or you're motivated to take on more than the minimum. All of these different things.

It wasn't just an accident that those things were provided to me. And when I got to the position where I was managing that structure, and solely responsible for developing and maintaining it, I was like, "Wow. There is such a lack of it, outside of our community. And so what we would do is try to help those other communities put some things in place.

First of all, they had to change their culture. They had to have a culture that was invested in

developing its own success, okay? You can be in an organization that is obsessed with profit margin or you can be obsessed with the number of clients that you can contact, or whatever your metric is that says "I'm successful today, as an organization. But if you're only focusing on the metric and not how to get to the metric, you're going to miss the target every time, right?

So if your people are your most expensive and most valuable resource, to get to that point, you should be intentionally investing in their success to build them to be the resource that provides you that success point.

And so, we would tell them, "Okay you need to provide structure and guidance, you need to consider whether you need training." And if you need training, at what level? Do you need to have training that someone can access on a computer, or do you need to have facilitated training with a coach or a leadership instructor? We have something called Leadership Management School in the Coast Guard, and you go and you learn about how leadership theory is integrated with your daily work in the military, and how management and leadership are separate, and how to communicate with people in a way that is respectable. Just because you have position power, whether it be to your rank or your job…like, "I'm a Deputy Branch Chief…"

KL: Or your project manager.

LM: Or you're the project manager, right? That PM will only be as successful as the team makes them. The team makes you a leader. You have to do that through relationship building, communications. So we do a lot of trying to teach people how to access emotional intelligence, how to access being a human being to other people in a military organization, so that you can elevate as a leader and not just a position person.

KL (10:24): If an organization is going to own its leadership problem and do some of these practices, that makes it incumbent on the organization to identify for their culture, what constitutes good leadership elements.

LM: Requirements definition.

KL: So that's no small feat to identify what constitutes those leadership qualities. Have you seen how that can be done?

LM: You know, it's one thing to say you want to be this thing. But how often are you measuring that, right? So you get all these different tools in place to try and measure that. You know, these organizational surveys in job satisfaction, you know… But when I was advising the admiral or anyone else when I was at the headquarters as the workforce manager, I'd say, "You know when was the last time we walked in there and felt that place? You bring in these people from outside of that chain of command, or outside of that unit, to just feel the culture there.

Just like every other organization, we have people, they get relieved in very senior positions, for not having a good culture. Just like a CEO of a major company. If their poor leadership is dragging that thing down, it's only going to last for so long before the company folds or someone steps in and says, "We're not allowing this to happen anymore, we're righting the ship." We do the same thing. A lot of times that's by bringing in independent third-party representatives, whether it be consultants or people from within your organization, but outside of those lifelines, to go in and take a look at

things. Sense what the culture is like. Sense with that leadership is like. How did this person get here?

You know? They were selected when they probably shouldn't have been for the role they were in. You could point at that promotion process, and say that failed us. As an organization, it didn't necessarily align with what we desire for that position. So, where did we fail in the selection of this person? And then take those lessons learned and implement them into your hiring process, into your promotion system.

LM (12:23): If you're a strategic leader, and you're developing a program where you can take tactical level doers and develop them into operational level managers, at that point you're trying to capture potential for leadership. Because they haven't really had too many opportunities to exhibit it, in a formal way.

KL: So, how do you identify what constitutes potential? That's a really tough one.

LM: It is hard. And we do a pretty decent job of it, I think, in the service, by giving your senior leaders, that you've already promoted to senior leadership positions, the opportunity when they evaluate an officer to say, "What is that member's potential?" They can capture it, in words, qualitatively on their evaluation.

KL: So there we're using expert …

LM: Kind of expert opinion. Yeah, and that works if your expert is dependable and the right person, and reliable. And there is the risk, right?

KL: Right.

LM: So that brings you full circle. Did you develop those strategic leaders, that are making those decisions for you, in a way that aligns with your organizational desires? Right? Is that person able to look down the chain working with the managers and say, "Alright I understand that's the best maintenance mechanic we have in the plant." Or, "That's the best budget guy or gal down in that project." But are they really the right personality and the right motivation to step into the management role?

Let's give them the opportunity to take on some more responsibility, communicate with them about how they feel about that responsibility. Let them perform. And if they succeed at performing, and they have an appetite still, and they want to try and step into the next level, we should consider them for promotion into the next phase, which could go up to a manager.

LM (14:12): You have to give people an opportunity to shine. They've got to stand out. You have to be able to recognize that some people are better at what they're doing than others. I always tell my guys, I can see when you care. I can see when they're putting themselves into their work, right? And so I think you can find a way to prepare your managers and your leaders to recognize that potential in other people.

KL: An organization has a right and an obligation to say, "Some of these folks are better at this than others," which means needing to stand up and say, "You don't get this promotion."

And the other one which is, "We've recognized you, and you do get this promotion." Whether we also – given that we're building them – but there is a certain obligation to own the decisions.

LM: Yeah, oh yes. We have a standard promotion cycle and we have a standard promotion window for rank. That won't work in every organization, but you should have some form of systematic selection in place. We had something that was telling our Junior Officers, "You have opportunities, here's a path to get to them. Here's what happens when you get there. Here's the rank at which you should be taking on these positions and look where your future is." You could look on this pyramid and say, "Oh okay, I could be the commanding officer of a ship one day. Or I could be the commanding officer of the Surface Forces Logistics Center, which is in charge of all engineering.

KL: So this works well for goal-oriented people, which is probably what you tend to hire.

LM: Yes.

KL: There are people who might not be so goal-oriented and yet want to achieve, right? But their personalities are designed different…

LM: You're giving them the opportunity to decide whether they want to be or not.

KL: There you go. There's a choice, and agency.

LM: Yes, yes,

LM (15:56): Honestly, it's hard to get a lot of organizations to invest in leadership training, because it's hard for them to sense the ROI, right? Like what is the return on investment when it doesn't produce a product that I'm selling tomorrow? You know? What is this doing for my work force?

KL: Well, let me throw another curve at you on this. There's a difference, too, I would say, particularly in my own case, coming from a consulting firm that's small, or from volunteer organization, both small and large, compared to what you got. One is, you have a captive audience, in the sense that people don't jump services.

LM: Right.

KL: So one of the problems we have in the private sector, I would say is...you know there's like a meme going around… What happens when we train these people and they leave? And the answer is, What happens if we don't train them, right?

LM: Yeah, which is like

KL: They won't stay. So the boundaries of organizations are more porous in a non-military structure.

LM: Absolutely.

KL: So the question becomes how to balance that leadership investment.

LM: Sure.

KL: I think that's one thing that is a difference. That's something to address. But I want to challenge you on another one: What about scale? How much this flat out scale matter here? How does this work at less scale? What do you have to say to those organizations that are 1000 people, 100 people.

LM: To me, it's more personal, and it's more important for them because you have more to lose when that one person walks out than maybe we do, because of that scale, right? You also have much more to offer as far as personal investment, like…Does this person feel like we're invested in them?

It's harder, I think, to do that as a larger organization, than it can be as a smaller organization. So, there's a strength there. You are not going to get as much dedication and stick it out for people that you don't invest in and that they don't see you as their leader. So at a minimum, your leadership strategy has to be that the people running this place are leaders and that everyone in that organization, because now it's smaller and it's closer, feels like these are people I want to be around, and this is a place I want to be. Maybe you already have this in your culture and you just need to be aware of it. You know awareness matters – being aware that the way you're talking to people, the way you're showing them appreciation, the way that you're asking them to move through your organization – all that matters because it's in the back of their head when they go to sleep at night. Am I excited about going to work tomorrow? Am I excited about the task I'm going to be doing?

KL (18:26): How has gender played in the leadership development aspect, as you observe?

LM: It really matters to the service. A large percentage of our younger people that leave the service are women Coasties, that sometimes feel like this is going to conflict with other goals they have in life, like they want to raise a family. But we're starting to see that men are making those decisions based on those variables, as well, more so than they used to.

We didn't worry so much about that with young men coming in the service decades ago. They're making decisions based on different motivators than they used to be, and so we need to be aware of what their specific desires and needs are. There is no separation between personal and professional sometimes in someone's brain about what their life is going to be. It's the sum of those things, right? So if there's an imbalance there – you know, the whole work-life balance thing – if there's an imbalance there, strong enough, then you need to help correct that or you're going to risk losing those people.

KL: These are questions you should be asking everyone. An organization actually needs to ask this broadly.

LM: Be a human being to other people.

KL: Yeah.

LM: That's the big point. If you just do that, you'll start to pick up on those things that we're talking about, you know? An investment in leadership and an investment in planning and structuring a leadership development program for your organization, or at least a culture that values the true

sense of what a leader is – versus just a position/power kind of thing – breeds a culture where people want to be there, and it breeds a culture where people are a little bit more willing to talk about their personal lives or a little bit more, talk about their personal aspirations, they're a little bit more willing to stick around a little bit longer because of that.

KL (20:09): Looking at the bigger picture, organizations should have a system in place to groom individuals with interest and potential to help them acquire the practical, technical, and cultural skills they need as they move up the ladder. And leaders and managers really need to know their team members to be able to recognize that potential.

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KL: This is the second time we've heard from Lisa DiTullio on PM Point of View®, she appeared in an episode on Teamwork: Influencers Part V, back in 2017.

Lisa is a recognized leader, author and speaker, in healthcare portfolio and program management, and is a founder of Your Project Office, a PMI-registered education provider and consulting practice. Besides being an author of several books, Lisa contributes regularly to many project management blogs.

KL (21:11): So tell me, what was the topic of the year for you? What is it that you're finding important through your practice?

Lisa DiTullio: I think that some of the old themes still ring true, because we haven't quite figured them out or solved them. I think that it is still less about delivering the project from a technical perspective, and it is inevitably, it's the human behavior and the human element that tends to derail us or complicate life on a variety of levels. So when we think about project management, program management, PMOs, we tend to still look at it from that traditional recipe book... But the reality is, is that we all know that the complexity of the projects and the work continues to heighten, and it continues to go at a frenetic pace. But for some reason, we continue to focus on that, and less on the human element and the complexities associated with it.

KL: So, where are you seeing it break down? I mean, we talk about being good at communicating for example, and engaging teams. So what's missing? Where are we seeing the crack?

LDT: I think that because we continue to distract on the work. And because it continues to burden us with multi-levels of complexity and an overarching sense of urgency, we get wrapped up in the actual work itself, and we, believe it or not, the very basics and minimums of basic communication, regular communication, keeping it simple and having a connection and a bond, seems to go by the wayside. And then we can't figure out why people don't understand what we've asked them to do, why people can't commit to dates, etcetera, etcetera. And that's the stuff at the end of the day that derails us from getting the stuff done when we need to, rather than the fact that we've put in processes that are not all compliant with our tools.

KL (23:11): It's back to understanding improved communication methods. And then you also hit *connection*s, the sense of relationship with people. So how have you been seeing this evidenced?

LDT: Well, there's a couple of things. We see it when we realize that when we get people together

for status meetings, or whether it's daily huddles, we usually start off with where we left off. And the fascinating thing about it is, where we left off is not always aligned. So what do I mean by that? People walk away not understanding or fully appreciative of what accountability is, what they own, what the actions are, or what they were supposed to do. And there's mixed signals, and then we have misaligned expectations, and therefore then we have either incomplete delivery or late delivery. And when all of that occurs, then we get into the nasty business of the finger pointing and the blame game.

KL: Sounds like also we might constantly re-tread ground because… Didn't we already have this conversation and move it forward? And now we're…it's almost like we're forgetting what we last said or what we last were supposed to do based on what we last said.

LDT: Yeah, absolutely, let's face it. What we're doing is, any time that we overlay a layer of inefficiency and we have to go back rather than going forward, that's a big problem for us because that obviously is going to just drag down our trajectory and our momentum in getting the work completed.

It's just going back to the very simple basics of communication on a regular basis and simply reaffirming the understanding of the teams as far as... "Do you have any questions?" "Can you repeat what was just asked?" "Do you understand what you're doing?" "Do you have questions of others?" Etcetera, etcetera. I kind of summarize it with, you know, what we were taught as kids, "Take your elbows off the table." "Don't eat with your mouth full." "Don't interrupt others."

KL: I was about to say, as you started that part there, was... I just wrote down, "Oh, it's about manners."

LDT: It is! We all know what we're supposed to do, but when we're going at a million miles an hour, we forget to do it.

KL (25:28): Why is this a project management problem, compared to maybe just an office worker problem? Or a team's problem?

LDT: I think the reality of what we do, when you compare it to basic business, there is an overarching layer of challenge complexity and difficulty, and the reason for that is the projects drive the change. So now you've got an extra level of complexity associated with the fact that we're going to start doing things differently, through the introduction of new things, new stuff, new technology, new products, new processes, etcetera. And that as a result, adds another layer of complexity associated with it.

Unfortunately, I think what tends to happen in the project space that we live in today is, we do not give enough cadence and credibility when we initiate the project to truly understand and give the full story of what are we doing, why are we doing it, and the benefit associated with what we will deliver to the organization. And so, as a result of that, the way we communicate is critically important. It cannot, for example, focus on project management jargon. It needs to be communicated and presented to a diverse set of constituencies and stakeholders, so everyone gets it. And if we always remember, "What are we doing as project managers?" We are instituting change. And the only way that people are going to gravitate towards that change – whether they are members of our project/program teams or they are the recipient of those changes – the only way

that we're going to get them to latch on, to get excited and to stay with us for the duration till we cross that finish line, and then make that change real, is to affect them at two levels: rationally and emotionally. And oftentimes we simply focus on just the dynamics in the business attributes of the project rather than being compelling around both.

KL (27:31): We've heard from more of the tools aspect, and the project evaluation aspect, around many of our guests in different podcasts, about the real need to see projects as investments on behalf of the organization, and therefore, it's about value. You're using resources to create something better. But you just said that instead of just talking about it as business value, you want to see it broader. So I was going with the value, to say let's think of it as a business value kind of context. What is the emotional appeal aspect of this if you're not talking about business value?

LDT: I'm actually sitting in an office setting today, where I'm overlooking the landscape through the glass window of a call center. So here's a perfect example of what I mean by that.

We take a project team. Often times we assign the project manager, a program manager, to masterfully shepherd that project from start to finish with a cross constituency of team members that know a whole lot more about the content that we do as the choreographers of the project. We can talk about it from a business perspective, we can tell them the problem we're going to try to solve, we can introduce an ROI. And we can talk about the requirements, the technology, and the process steps we're going to change in order to make it better. But I look at these folks that are picking up the phone, and they are the first interaction to the customer every single day, all day long. If I was on a project that was responsible for deploying a new call center or a CRM system to make the business run smoother, to get to the… answer the call faster, to track the customer experience, for example, that's all the business attributes in association of that particular project.

If I, however, at the same time I launch that project, combine my story and my initiation with compelling input and/or quotes and, even better, let them sit in and listen to a customer experience and watch the customer experience, both from the customer service rep, as well as the person calling in perspectives. What I've now done is I've drawn every person who's going to be responsible for engaging as a project team member on that project a more emotional, real-time experience of what that is and why it has meaning, not just from the financial or the "business attributes," but from the human element as well.

And by virtue of doing that from the time I initiate, to the reminders that I provide on a regular basis as we get going through this, excitement builds, engagement continues, and we all have a far more human connection to our ability of what we actually have affected, not just within the business, but how it touches the customer.

KL: You're highlighting that we do need to see these projects is valuable, as investments, but going beyond that, in the context of what other value is associated with this. It's more than the business or the financial value, it's a larger business value, and that needs to be expressed is what you're finding.

LDT (30:45): If you think about what PMI has developed with their Talent Triangle, and they've established and identified in a credible way, are that good, successful project managers have to fine tune their leadership skills. I think in today's world, it's no longer about leadership. Yes, that's needed. I actually think it's about human-ness. And that's the element of connection that needs to

occur, where we are the ones, because we are responsible for getting the right people on the team, engage them, keep them focused and excited from start to finish. Which means they have not just longevity, and staying power and getting the work done, but they actually remain emotionally engaged and excited about what we're doing and what we're creating. Because it goes beyond the ROI, or it goes beyond business value. But there's an emotional component as well. That's where I think we are heading and where we need to get to in order to really succeed in this space.

KL: Interesting, that's not one of the triangles. Be a human. There's an issue with leadership, in that they talk about it, you know, leadership has to do, some people talk about it, as having followers.

LTD: For me, the new paradigm shift is that, instead of us believing that, as leaders, we need to get those to follow us, I actually believe the new definition is: We need to harmonize. One of the best ways for us to humanize the relationship and to harmonize our team, one aspect of that is not only to provide them with that emotional experience of how to really gravitate and catch to both the rational and the emotional aspect of the change we driving in the project, but through that leader's behavior, communication and interaction with others is the reality. And I think you touched on it, Kendall, which is, we are all human, which therefore represents the fact that we all are vulnerable.

KL: So now we've hit it. That's what's missing then, because that can inform all of our skill sets. It seems to me...

LDT: Yeah, we focus in a business world around skills, competencies, knowledge. How much do you know? What are your credentials? What's your background? We prove ourselves with our tangible accomplishments. But the fact of the matter is, if we only focus on the work and not also on the human, we're limiting both our capabilities as a project leader, as well as our team capabilities.

KL (33:25): So tell me something about vulnerability. How are you defining it in a work context, and how is that meaningful then? You've drawn the logic to it. So now let's talk about what *it* is.

LDT: Sure, sure. So I think it's, again, it's the simple stuff. It's other than pretending we know all the information and assuming that as a leader, we should be an expert, we acknowledge when we don't know something, and we don't know the answer. But with the credibility associated with that is, "I'm authentic." "I'm being honest." "I'm not going to BS you." But I'm also going to be accountable so I can help us figure out what the answer is or where to get the information.

And there's a really easy technique of doing this. For team kick-offs, having the ability to actually share a little something about yourself that people don't know, without having to put anyone in an uncomfortable position (divulging something that would really be upsetting to them). Again, instead of getting into a meeting and immediately launching into the formal agenda, the minutes from the last meeting, etcetera, periodically mix it up and put the human element out there as well.

KL: So it's actually about being cognizant and purposeful with some of the human-ness that we all have, and actually remembering to put that in.

LDT: Yeah, and that can also be achieved by just simply thinking about the words that we use. Again, it's the basics, but oftentimes, if I'm about to speak, or more importantly, when I write something, if I'm writing a memo to my team, for example, and I write it and I realize that I've used

the letter I, or I've talked about me, or I've said you, I will go back inevitably before I hit that Send button and always ask myself "How can I unify the language with the We and an us?" for example, instead.

KL (35:24): Have you seen how vulnerability is handled? Like that's kind of a way to help preset a meeting, and to bring that in, to allow us to interact better, kind of, is where you're after, I think.

LDT: Yeah.

KL: Presumably because it'll allow better things like accountability and more honest reporting. It allows the authenticity, honesty and accountability that you highlighted earlier, right?

LDT: It does.

KL: So how have you seen that play out?

LDT: I think that those teams, when they get started, when they get ready to initiate a project and they focus on the business elements, and if they are able to also put into that the emotional piece around, for example, the analogy that I used around the client service folks, and if you were doing something in them, have you sat in their shoes, do you know how difficult it is, and what the client needs are, and get the emotional attribute in connection to it. But I also think that it's about opening up the field and allowing that team to have a dialogue among themselves, whether they've worked together previously or not. What are their rules of engagement among one another? How do they want to work with one another? And I think when you give them an open canvas and maybe even some guidance, maybe some areas that they might want to think about, but it's not a directive, I'm not telling them what it means if we start, if they arrive late. I let them talk that through. When they collectively talk about it and create some operating rules that they have built based on their own, either history, background, value systems, best practices, lessons learned, etcetera, they get into a dialogue that does become more a relaxed engaged conversation. And because collective build has happened among the team members, they self-police themselves, if you will, in a more human relationship established way.

KL: So there's a second technique for us there. And I think that's something that is often done. I don't know if that was in one of the best practices things, but I've certainly experienced that myself, where it's kind of, "How do we want to communicate?" And I've done it through – and tell me if this has worked with you at all – "What I need." Like what I need, and how I'm going to work, like how I tend to act, and then we get a collective group as well. So as a group, we all agree that these are kind of the things, and then also we're aware that you'll do better if you do it this way with Kendall, or with Lisa, or whatever, as well.

LDT: It is, although there's a little bit of a dangerous…there's a slippery slope when we go into this, I believe. If I go into the conversation with, it my turn to speak, and I start with, "I need," then it actually is, in my view, the experience of that is actually counter-productive. Because only stating what I need without...there's a different way of actually putting it out there. It could be exactly the same thing that I need, but the way I nuance it makes an enormous difference.

So for example, if it's my turn and I'm sitting in a group and I say, "Well I need." Instead, "What do you think about?" Or "How about this?" "What are your thoughts and reactions about this

suggestion?" It's a delicate balance between demanding what my needs are without a whole lot of consideration to yours, and then we can get into a big argument or debate about it, versus I am, in more collaborative, fashion putting out potential suggestions, options, things for us to think about. Even though I know that as we think about it, I am always thinking of myself in that process. I'm just making it less visible during the dialogue.

KL: Yeah, I think that's a really good point.

KL (39:16): At the end of a project, when projects are done, when the investment has been made and the value has been created, how have you observed that people reflect that the human-ness happened?

DTL: So again, it goes back to, it's about refreshing the traditional practices, where we started this conversation. So in the project management 101 class, everyone is going to be taught that when the project closed, conduct your lessons learned, identify what's worked well, what hasn't. And the reality is, is when we do that, it is almost always focused purely on the technical attributes of successful project or program delivery.

The other component of that. And again, to keep the human-ness element into it, is, whether it is an individual reflection and/or it is a sharing of that, it is actually making a formal process to encourage that everyone actually have an individual self-reflection on how this was at the human element.

KL (40:22): Yes, PMs. It turns out manners, good old manners, are an important element of a well-functioning organization. Leadership is a mandate to harmonize the relationships of the team. Remember, beyond the bottom line, you must never lose sight of the human value of your projects. Make it more about us, and less about me. (Haven't we heard that before?) And I really like the idea of including an analysis of the human element in your lessons learned. You can find Lisa on LinkedIn Lisa DiTullio. Or at yourprojectoffice.com,

KL: I'm pleased to have Paul Pelletier back for his third guest appearance on PM Point of View®. He was actually on the same episode as Lisa earlier, on Teamwork. And before that, he appeared on an episode titled "Security" in 2016. Paul is a corporate lawyer, project manager, public speaker, author, and business executive. In the past few years, he's focused on helping organizations establish a respectful workplace, and has published two highly regarded books on bullying.

Paul Pelletier (41:35): Bad behavior is a fact of life in our workplaces and we need to be accountable, and we need to have tools to help us be accountable, to ensure that we understand that we are obligated to participate in our workplace culture. We own it. And so one of the most, I think, common challenges when we're faced with a bully, or just someone who's a control freak, or someone who's manipulating the workplace or the project, is this sort of overwhelming fear we have, even to speak out, even to your trusted co-workers.

You might feel like you're going to lose your job. You might fear those above you, that have authority and won't take kindly to what is really kind of like whistle-blowing. But that silence is what enables workplace disrespect, and bullies to thrive. I believe that we need to speak about these elephants in our rooms: Control Freaks, Queen Bees and Workplace Saboteurs. And it requires some direct conversation. And if we don't have a respectful workplace culture where everyone feels

like their voice is important, or where they belong, you won't get loyalty, you won't get people being innovative, you won't get inspiration. And companies are losing their staff. It's impacting their bottom line and their client relationship. And it's really all caused by just people treating people badly.

KL (43:11): There's negative behaviors that are not necessarily motivated through some sense of evil or wrong dealing.

PP: Absolutely. It's a spectrum, and the vast majority of control freaks, this is their leadership style. This is how they think they are effective. What they need to appreciate – and this is called performance management, and providing people with constructive feedback and so on – is that we as an organization the employees in it, we as a society, we have to stand up to ineffective and negative leadership behavior.

If you are impacted, or when you're impacted by bad behavior at work, you really do have two options. Every action, including silence, is a decision you really need to be accountable for, and have to live with the consequences of that decision.

PP: I want to disrupt our hard-wire tendency towards that kind of paralysis and speechlessness by presenting silence through the lens of ethical accountability.

I've heard many times that... Oh, well the idea of ethical decision-making is the sole responsibility of senior management, and they have the authority and power to make and implement decisions, so they're the only ones that should be dealing with these people and this nightmare. And I respectfully disagree. And I think that each of us has a duty, first to ourselves, to our co-workers, to our families, and yes, to our organizations to act with integrity, and to demonstrate courage in the face of incivility or injustice. And also as employees, we have made commitments to align with our organizational policies. And the vast majority of organizations today have behavior or codes of ethics or workplace respect policies, and they create a positive obligation on us to act. And I remind people that by doing nothing, you may well be breeching your own policy commitments to your organizations.

KL: So it's not that organizations ignore it. The organizations have said, "We have some way of escalating, some way of highlighting," but people don't. It's a conspiracy of silence almost. It's a *tendency* to silence.

PP: It can be. We can be part of the problem, but way, way, way more importantly, we can, and should be, part of the solution.

KL (45:56): So do you have some tips or some ideas about how people within an organization should respond? Because you don't want them to…

PP: Oh, for sure. My first and foremost tip is the thing that we tend to do, it's very human, is if we are upset, we respond immediately. We are emotional. We say things that we probably don't really want to say and aren't really proud of saying. So it's... Have some emotional control and maturity. Check in with your head. And are you angry? Are you resentful? Are you upset? If you are, that's good, that's normal, but don't answer or respond or try to act right then. Plan what it is that you want to do, look at what is the most likely to be the most effective. Who are your allies? What are your

workplace policies? Historically, how are they interpreted or how are they enforced? What is the nature of your workplace? Is the person that is the Control Freak or the Queen Bee or the Sabateur, is this a person with a lot of power? Does that mean you don't do anything?

No, it doesn't. It means that you have to be realistic. And it's a real range. One of the tools that I really spend time, in workshops and presentations with, is actually role modeling and doing mock direct conversations where someone has disrespected you. And actually approaching that person with a planned conversation about what it is you want to say, how you need to say it, being direct, being brief, being informative, making it clear that this has to stop. And then for sure documenting it.

So following up with an email that is basically a thank you email saying, "Thank you for our conversation today; I just want to be clear that I really appreciated that you're going to make an effort." It's your paper trail. Because if Jane does it again, you can go back to Jane and say, "Hey, we already talked about this. Remember?" You follow it up again. And there is an escalation process for sure. And there'll be a point where you have to put up your hands and say, "Okay, Jane's not getting it. I need help." And go to, let's say your boss or Jane's boss or Human Resources or those other people that might be able to help.

But you have a really clear trail of paper documents that show, "Hey, this is what we tried at first. This is the second conversation, this is the third. I'm out. I can't do it anymore." You'll really give those people a tool and information that will help them be more successful in addressing Jane's challenges.

KL (48:49): I want to clarify. Criminality is not what we're talking about here. We're talking about disrespect, which I would say is a lower level of intentionality.

PP: Absolutely.

KL: I assume that's what we're talking about.

PP: Oh my gosh, yes. Separating what is just simply bad behavior from things like discrimination, racism, sexual harassment, violence in the workplace, those are still on the spectrum of disrespect, don't get me wrong. But those are the worst case scenarios, and if you're involved in anything that looks like that, my advice is much, much different. That is where you need to get safe. You need to get out. You need to protect yourself. But it's all disrespect at the end of the day and the really terrible disrespecters start with small steps.

KL (49:42): It's been my observation in organizations, if there's somebody who sends emails that are harsh, I don't know they're known to be brusque, it causes tension. And your solution was to address it directly. What I often have observed is people respond by, in fact, seeking allies, which I would call gossiping. So what you end up with is a group of people maybe not feeling good about their environment, caused by one person. But no one has said anything. What they're doing is essentially gossiping among each other, which is essentially exacerbating the problem.

I observe that a lot. So this idea that I'll tell someone else that I'm upset. "Oh yeah, I know he's like that." Or, "She's like that," or "They do that in meetings," is not helpful in that it's hard to address because nobody will be specific then. It's kind of like everybody knows, which means nobody owns

the problem.

PP: I couldn't agree with you more. Gossip is, without question, the most useless and detrimental, way to deal with displeasure or dissatisfaction at work. And I have actually worked with organizations where everyone who attends the training signs a huge poster that has a big red circle with an X through it, and the word GOSSIP. And those posters are all over the workplace so that whenever gossip happens, everyone is reminded, and they can say, "Hey hey hey, do not gossip!"

KL: You're hitting on human tendencies here: our herd behavior to be quiet, and kind of get along, and then our herd behavior to chatter.

KL (51:20): Let's talk about the role of the organization. You mentioned that the leadership could be foul or the wrong kind of culture itself, they set the tone. What is the responsibility, and in fact, what are the options, for the organization and for the leadership that needs to structure the organization?

PP: You will never get better behavior than the behavior that you demonstrate as a leader, so you truly set the tone.

KL: So, if we normalize the responsiveness of people as everyone bumps into each other, that sounds like a real progress in building stronger organizations.

PP: If you eliminate the unnaturalness, or the fear issue, around what some people call "confrontation"… I don't call it that, I call it communication. How are we to know that we're acting inappropriately, or that we are lacking a boundary, or that we aren't as diversity intelligent as we think we are? How are we to know, if no one takes the time and if it's not normal for people to take the time to educate us?

So it's that constant learning. We are constant works in progress, but we owe it to ourselves to, first of all, be open to that feedback, and expect it, and to deal with it maturely. But we also owe it to our companies, our organizations, our colleagues, and co-workers, to do it as well. And our leaders need to be the example. They need to set that example. And from the top down, it has to be abundantly consistent, clear and authentic, that the leaders expect us – and they themselves, too – will hold all of us accountable for a workplace culture that is respectful. If the leaders aren't in, and they don't walk the walk, then none of this works.

KL: So let's talk about the leadership. What do you want them to do so?

PP: Certainly, there's some fundamental tools that leaders can ensure that their companies or organizations have in place. First and foremost they need to have a very robust code of ethics or workplace respect policy that is really clear, about what that behavior looks like and what it doesn't look like, and that policy needs to be enforced. And people need to be not just made aware of it, but I believe they need training. Leaders can initiate awareness campaigns, because many of us lack the tools and knowledge to identify these problems, and to, as we've just discussed, confront them. And to create a culture where that conversation becomes normal.

And then the last thing I think that organizations do badly is they don't implement fair processes for reporting that behavior. And they don't have fair investigation processes when bad behavior is

reported. So often you're supposed to report bad behavior to your boss. And unfortunately, 70% of the time, it's the boss, that's the problem. And then you have to go to your boss's boss. Well, that often, as you can well imagine, doesn't go very well. Instead of having a completely unbiased, safe, user-friendly reporting process that works to everyone's benefit, and insures confidential, trustworthy, impartial processes, they just sort of rig the game.

KL (54:51): When we talk with PMs, we often see them as the leaders of teams within larger organizations. What would you tell them to do as the leaders of their team?

PP: First and foremost, set ground rules for your team's behavior. Have in your project plan a behavioral component. So that people right away, "Hey, oh, in this team, these are the things that I need to align with.

I would recommend to a project leader, in your first meetings, that you accept the standards that you want people to behave by. So you say, "Listen, we were all here for a reason. We need to get all of our ideas out. And everyone's ideas equally important, so let's set some ground rules. We're going to instill in our team a sense of belonging, and that we all need to be clear about what is important to us and what kind of behavior is bad for us. Or hurting us."

KL (55:51): How will we see an improvement? You seem to be on a quest. And I'm wondering how we can know and measure it.

PP: Well, there are some people who are looking at doing doctoral theses in algorithms that quantify the cost of a workplace bully, and incorporate everything from sick leave, to disengagement, to HR time wasted, to legal settlements. Legal Fees, executive time engagement… That to me could be game-changing. But I do believe that where you'll start to see change, and where we have seen radical change, is, for example, at the government level. Many countries have now made workplace bullying illegal. It's considered a workplace hazard, a health hazard for employees. So it's part of employment standards on workers compensation and so on.

And in Canada, for example, workplace bullying is illegal. And if you encounter it in your workplace, you can report it to an external Workers' Compensation-equivalent body, and they come in and investigate. And they have the power to make some pretty powerful decisions.

But most importantly, I think it's when we see that it's totally normal to have what might have, in the past, been a confrontational conversation about workplace behavior. And that actually becomes a completely normal and expected conversation that we all are held accountable for, and that we are really engaged, and we own the workplace culture that we want to work in. When the fear is taken out of that conversation, and our leaders start acting like real leaders, I think we are in for a very profoundly improved workplace.

KL (57:52): Being able to discuss issues with a colleague who is going against your grain, shouldn't be considered unthinkable. Indeed, we should be able to open up about our workplace emotions. If we think of it as communication rather than confrontation, and if it's considered a normal thing to do, we'll have a much more pleasant and healthier work environment. Just remember, don't be emotional when you initiate the dialogue. Have a plan and document your interactions.

You can find Paul's articles, blogs and videos on the PMI.com portal. His books are available on

Amazon.com.

So PMs, work shouldn't be a drag. Think of your teams as a family. Connect with them on a human level. By fostering an over-arching atmosphere of camaraderie and trust, everyone can thrive. Your work will be that much richer, that much more rewarding, and your projects will be that much more successful.

Special thanks to my guests, Lucas Marino, Lisa DiTullio and Paul Pelletier.

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Be sure to tune in to next month's episode, "Productivity."

Alan Zucker: Get waste out of the system. Think of the number of things that we do in the course of our day that really provide limited value, or no value to what we're trying to do.

Sarah Hoban: We expect ourselves to be all things to everyone, and we don't want to let anybody down, because our job is the central focal point to keep things running, right? But I think what we have to remember is, if we don't take care of ourselves first, those that are around us will not succeed.

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