75. Milestones in History

With Mike Hannan & Shaun M. Simms

Kendall Lott: Pandemic and protest. This is where we find ourselves as we complete this production. Today's episode is not about these times, but of times historical, that have resonance with events of today, even as they are different. History doesn't repeat itself, but it often rhymes, so the same goes. With interviews recorded over a year ago, before corona virus, before the most recent headlines of demonstrations in support of a socially just society, this episode of two historical moments reminds us of our need and ability to approach urgent, painful, ambiguous, frightening situations with a sense of leadership, vision, adaptability and trust.

These stories are shared to provide lessons for project management, not political points of view. The first is of the amazing Manhattan boat lift in the hours after the 9/11 World Trade Center attacks. And the other is of the elegant and sophisticated planning of the Montgomery Bus Boycott of over five decades ago – a pivotal moment in the ongoing and clearly unfinished development of civil rights for black Americans. Told from the distance of time and not from people engaged in the activities themselves, these narratives are not meant to imply the type or nature of solutions for the crises of today. They are to remind us, in events of great pitch and moment, that leadership will forever be needed to make difficult things happen.

As William Faulkner wrote, "The past is never dead. It's not even past." We are always and continually challenged to provide our skill and thoughtfulness from the Project Management Point of View.

Mike Hannan: So if you compared Dunkirk to 9/11, just by number of people rescued per hour, it's something like 1500 people per hour at Dunkirk and 35,000 people per hour in 9/11.So it's like 55 times more.

Shaun Simms: Those first three days, where you have to make the decision; you have to determine exactly what you're going to do; you're going to have to issue some planning and risk around the idea that individuals who took the bus can't take the bus anymore; and then the unbelievable communication to all of your significant amount of stakeholders was brilliant.

Kendall Lott: In this episode, our PM Point of View is historical, as we study two events from modern history through a project lens. Both of these undertakings emerged as part of larger events. There's a sense of urgency in both, as well as clear-cut goals. For the 9/11 boat lift, it was all about saving lives immediately, as many and as quickly as possible. For the Montgomery Bus Boycott, beyond correcting the injustice of segregation on city buses, the organizers had precise demands for the city leaders. Planning, scope, risk, constraints, communication. All of these elements factored into the unfolding of the projects. And whether instinctively or intellectually, the project leaders approached the demands at hand with an eye to basic project principles.

I invite you to listen now to my discussion with two PMPs, Mike Hannan and Shaun Simms, who studied these endeavors as successful projects, with important lessons for us to learn.

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, Kendal Lott.

KL: My first guest, Mike Hannan, is founder and President of Fortezza Consulting, as well as an adjunct professor for the University of Southern California's graduate level program in project management. He is an author and leading innovator of disciplined ways to integrate Agile, Lean, DevOps, Critical Chain, and other techniques to drive dramatic breakthroughs and performance of project portfolios. He has a story for us about flow,

KL (03:55): I have Mike Hannan here, back for what the... fifth time? …having hosted it once. And as always, dealing with the interesting and cutting edge questions and outcomes surrounding project management, and how we can think more broadly about our discipline in its application to cause change and to make things happen.

And you have a fascinating story that, if you get a chance see him present on it. (He has presented in other places on it.) But I wanted to capture it as one of our examples of big historical events that have happened, that turns out there's a PM Point of View®.

So our discussion today is actually around that morning on Tuesday, September 11th, 2001, when the World Trade Center Towers were hit with a terrorist act, and they both fell. And that triggered a whole series of events, obviously for many Americans, both personally and as a culture, and in terms of even politics. But there's a project management story in here that has to do with some success when bad things happen. And there's some interesting rules that we can learn from the world of project management and kanban and Lean and Agile and flow.

8:46 in the morning, the first tower was hit. 9:03, the second tower. And then things start falling apart very rapidly. Around 9:20, all the bridges and roads out of lower Manhattan were closed. And there your story starts.

Mike Hannan: Bridges and tunnels were closed for fear of terrorists entering in and causing more mayhem. But of course that created a big problem of its own, where there were now close to half a million people who were stranded.

KL: Trapped even.

MH: Trapped. And if you were to look at an aerial photo of lower Manhattan shortly after the collapse of the second tower, you would see that the very southern tip of Manhattan and with a handful of piers and docks, right, in that area, were basically walled off from the rest of the island. And the wall, so to speak, was dust and debris and smoke and fires and falling buildings and collapsed basements of nearby buildings, and all that kind of mayhem. So nobody wanted to run or walk or crawl toward that.

KL: Right.

MH: And in fact, all that, the clouds of smoke and dust and debris were taking over even that small strip of lower Manhattan that had been in sunlight until that point that morning. So those people

were feeling more and more cornered.

KL: So they were on the south side of the island and they can't go anywhere, because they were surrounded by water on three sides, and burning buildings and debris on the fourth side.

MH: Yeah, so then, especially if any of you have seen the movie, "Dunkirk"…you know, up until 9/11, Dunkirk was the largest sealift rescue in the history of humankind. If you think about that scenario, Hitler was actually not pressing the attack at the moment. The German advance had been halted. But that was not the feel in lower Manhattan on 9/11. The feel was, "This attack is on." And a big fear, as a lot of the 9/11 Commission reports and other things that came out later made very clear, but a lot of people at the time, the authorities that were trying to govern the situation at the time, the people that closed the bridges and tunnels, were concerned about at the time were, "You know what? There could be a second wave. This could all be just the set up. Maybe this was designed to trap all these people, and then have a big chemical biological weapon dropped on us."

You didn't feel like you could get somewhere safe. And many of those people actually had jet fuel, burning, dropped on them, and had pretty tough, horrendous burns. You had small children separated from their parents. You had elderly and infirm. And so that's the overall feel of, especially after the buildings collapsed, people really were trapped in dust and debris and couldn't get out. People who were emerging did look like zombies, kind of caked in all this dust, not able to see, barely able to breathe. I mean, this attack was underway. That was the feel. The temptation to then feel like, "You know what, this is all closing in on me and nobody's coming to rescue me, and what options do I have?" Well, we saw some people that were trapped in the towers themselves were jumping. That was what some people were starting to do into the water too, to get off the island.

And so, if the reaction of a sealift rescue hadn't happened quickly, and hadn't given people some hope that this was their way out, there would have been unmitigated human disaster. People would have just jumped in in droves. Any boats that might have been there trying to rescue them would have probably bumped into them and compounded the catastrophe. And so I think the question you're putting to me, Kendall, is, "How did they do it?"

KL(08:55): What are the numbers here?

MH: So Dunkirk was somewhere in the neighborhood of 330,000 British and French soldiers. And the operation pulled them across the English Channel to safety within nine days. The British Navy, arguably the best Navy the history had known up until that moment, didn't do it alone. They had to call upon civilian boats and volunteers, and somehow orchestrate something that hadn't been drilled for, with people that were not in their chain command, and still make it happen.

And so the soldiers were lined up on the beach, nice and orderly.

KL: Because they were told to and they could.

MH: And they had that discipline and planning and preparation. They had enough Navy boats, they were orchestrating the whole thing, that if I showed up as a volunteer with a small boat, I'd run into one of them and they would tell me what to do.

KL: Right.

MH: You take the 9/11 scenario, not only is it far more people – it's almost 500,000 – you then had the scenario of... The attack is on. You had the situation of regular civilians, and elderly and infirm and injured and burned and infants and all that as well. But then you also have the scenario of, as urgent as things were for Dunkirk, nobody knew when Hitler would decide to press the attack. In the case of 9/11, it was this attack that could wipe out all those people that are actually defenseless, they're just sitting ducks, we've got to get them off as fast as possible with even more urgency than they could have possibly felt at Dunkirk.

KL (10:32): So what happens? We get our nearly half a million at what kind of rate?

MH: Yeah, so here's what really resonates with me, is not just the total number of people, which is quite impressive to say, "Hey, I'm the largest," but arguably the fastest moving, highest throughput, with the fastest flow of rescues. So if you compared Dunkirk to 9/11, just by number of people rescued per hour, it's something like 1500 people per hour at Dunkirk and 35,000 people per hour at 9/11. So it's like 55 times more. That's the kind of breakthrough performance that most of us don't even believe is possible, right?

KL: With people who haven't trained for it, that's the thing, or don't have the discipline for it. They're just neighbors. The people who were at...

MH: Amen. And that's kind of my point is, imagine how good we could be if we actually had a discipline around it.

KL: So they were off within a day?

MH: Nine hours. If memory serves, it was roughly around 3 PM or so that the bridges and tunnels were re-opened. So you did see people rescue themselves by walking across the Brooklyn Bridge if they lived in Brooklyn, or just...I don't care if I don't live in Brooklyn, I'm going to get out of Manhattan.

KL: If you happen to be around the bridge.

MH: Yeah, but the rescue effort was able to pull the majority of those who they rescued off before that happened. Then there's still others that they rescued by boat, just because they didn't know that the bridges were open. They couldn't see the bridge from where they were. They didn't know there's another way out. There's no text message going out to everyone saying, "Hey, bridges are open now, you're free to walk home." And even if there were... Do I want to walk back through all that cloud and smoke and dust and debris? Probably not.

KL: So the effort continued.

MH: So it did continue, and that's why the nine hours. It started after 10 o'clock, and so count nine hours from that and you get to a little after seven.

MH (12:21): My brother was one of those that was stuck in lower Manhattan, and pulled to safety. But I didn't know that it was the largest sealift rescue in history, or the volume, or how they did it, until I saw this video that came out on the 10th anniversary, that you can find on Youtube. Tom

Hanks narrated it.

So the Coast Guard did lead the rescue effort. However, they only had a single boat. And they realized that given that they are the lone federal authority governing the waterways in that area, they could assert that leadership and hope everyone followed. And given that there was a lot of people united under a common goal there, it worked well.

But yeah, there were local maritime organizations from municipalities and counties in New Jersey. You had Port Authority of New York. But most of it was individual tugboat captains and volunteers that actually did the rescuing. So anyone that had a boat. If any of you have been to New York and taken the Circle Line tour around Manhattan Island, the Circle Line was one of the rescue boats.

And when I saw the leadership that Coast Guard Captain Michael day initiated, I began to wonder how he could possibly have pulled it off. And I even sent him an email and said, "Hey, I'd love to talk about this. I'm just this geeky project manager, but I think there's lessons for us PMs in all this. Would be great to talk to you about how you did it." Luckily, he e-mailed back, and we chatted for an hour or so by phone.

And I said to him, I said, "I feel like there had to have been four things you did to pull this off. Please tell me I'm right." In my mind, this had to be something…to achieve those performance breakthroughs, just had to be something that really could and should be codified.

MH (14:14): You think about people already losing their cool and afraid and thinking that their only hope is to jump into the water and swim to safety, and that alone is preventing boats from accessing people that are still waiting to be rescued. And they're being hit and killed in the water, then you have complete mayhem.

KL: That's what could have happened.

MH: Easily. And in fact, I'll go further, that's probably how most of us as leaders would have responded. We would have said, "As many boats as can show up on those piers, rescue as many people as possible, as fast as possible. Please come."

It's a natural instinct. If we actually command enough resources to throw resources at the problem, we want to throw resources at the problem really fast. And we have examples like with our response to Hurricane Katrina, where we did, with good intentions, throw as many resources as we could at the problem, as fast as we could, and it created some pretty big problems. But these guys had the presence of mind to think it through and play it a couple steps forward, and say, You know what, if we get that wrong…This is bad."

And when I asked Captain Day about that, I said, "Yeah, you must've realized if you just threw resources at the problem, it would have been a disaster."

KL: So here are you hurdled your consulting skills at him, and said, "I think I know some of the answers, is it true?"

MH: And he paused for a minute, and he goes, "I guess I never really stopped to think about it, you're right."

If you don't figure out where your natural constraint is, or where you want to move it to if it's not in the place you think it should be, you'll probably create a big disaster.

KL: So tell us what you mean by constraint here.

MH: So in this case, they realized right away, "We've got one boat. If we're going to rescue all these people we've got to get more boats." Right? So if our constraint now is boats, but we think we might be to do something about it.

KL: Right.

MH: Right? And they had a CB radio. And a lot of book captains are on CB radios. Back then and still. They realized, very smartly, where the constraint should be, that we can't change today. There's a limited docking space at the piers. Right? The few piers that were available in lower Manhattan. So if we call out for boats, and we get more than we imagine we need, how do we prevent this from becoming an unmitigated disaster? And they did something so simple.

They just said, "All boats that are interested in helping with this effort, report to Governor's Island."

KL: Which is not at the pier, it's off island.

MH: It's just across Manhattan island. A perfectly located staging area, where you put your excess capacity, should you need it, in place, and only send them in if they've got a clear sea lane, they can operate with focus, clarity, no impediments, get the people on, get them off, get them to your destination, and let's see if we can get that to happen faster and faster and faster.

KL (17:02): So did he describe that he sat with people and discussed where the potential problems would be with this? Or, you know, he wouldn't say it that way maybe, where the jam was going to be, where the...?

MH: He did send that he had a couple of quick conversations with a couple of his key deputies. And that they quickly said, Yeah. So let's see how many boats respond. We don't know what the response will be. But they still had the anticipation to say, Well, what if we do get a good response? We need to control it. So the way he described it, it was, "We just knew that in the midst of chaos, we had to be the organizing force."

KL: Yeah, so governance is going to matter here. Control matters.

MH: So you had to have that kind of governing principal in place.

KL: Yeah.

MH: Right? If we don't keep this system stabilized against that constraint, it could be chaos.

KL: Yeah.

MH: But then you must also, even in spite of all the pressure to just start saving people, you must

have had to plan it. Even if the planning was quick. And he kind of said, "Well, we were all just responding, so I'm not sure what you mean." And I said, "Well, you put out a call on the CB radio to boats. You decided to do that as part of your communication plan, which was part of your overall execution plan, and then you actually staged it off of Governors and which is part of the plan. And all of this was done in conversations before you said, 'Go, go, go, go, go, rescue people.'"

KL: Yeah. So the PMBOK® is right, in the sense that it's about practices that need to be done, but we often default to spending a lot of time on them, and that's what it doesn't say to do necessarily.

MH: Right on. And my encouragement to anyone listening to this is, of all the scenarios in which you've felt a sense of urgency, where you couldn't afford the time to plan, and you felt the temptation to skip planning, think about the temptation to skip planning these guys had.

KL: Yeah.

MH: And think of important their planning was to their success.

MH (18:50): He said, "Yeah, so far, you're right. We did those first two things. We figured what constraint was and moved it. And then we planned. So that's right on." He said, "So what are the other two things?" And I said, "Well, there's no way you could have had performance that high without people supremely focused on the task at hand."

KL: That's to create the flow? The throughput?

MH: Yeah, any study of human psychology on human performance shows that the moment we start trying to juggle tasks performance degrades. And especially if you're in a situation like that one, where there's all kinds of distractions and…

KL: Literally things blowing up and falling down around you.

MH: But if I say, "You know what, I'm this captain of this boat, and I'm going to this pier and taking these people to this place in New Jersey across the river, and then I'm just going to do that over and over and over and get better and better and better at it…" That gives me a much more stable sense of execution, a heck of lot more focus than, "Should I go to the other pier? Are there more people there?"

KL: There's something in here that's haunting me. This is not, though, Captain Day on the radio with each one of those captains saying, "Okay, please go at this speed at this moment." It's one thing for him to set up the planning and to know what the constraint was, as you would say in a consulting context. But those individuals are the ones that are figuring this out once they have the rule set.

MH: Right! The only thing you like the command center demanded and needed was the right signal on how fast this is all working.

KL: Where are you and how fast?

MH: If you're two minutes from pulling out of that dock, I need to get someone ready to slide in

there. Right? As soon as you're gone.

KL: But they're looking at the system level, though. They're not talking to the captain. "Why are you behind? According to our records, you're now going to be 7 minutes late."

MH: It was very much, "We trust that you going as fast as you can, and you're dealing with elderly people in wheel chairs and burn…"

KL: There you are when the trust word.

MH: "…children without parents, and…"

KL: So they're trusting people who are not part of their team even, not part of their formal team, part of the current cross-functional team, if you will, right? From all these different…

MH: Yeah, and you know, let's...

KL: That's some thing in there actually.

MH: …let's touch on that because a lot of people that I talk to about this story say, "Yeah OK that's an interesting story, Mike, and I get the points on flow and constraints and planning and agility and focus and all this other stuff. But come on, that's a really rare circumstance, where everyone is so unified against that common goal and even willing to risk life and limb to help achieve it... How often do you see that in an average day-to-day projects environment?"

And I make the point, okay. Yeah, there's some truth to that, for sure. But a wise person once told me that the best way to unify people is to make sure they have the same shared fate. Those people didn't have the same shared faith. Those boat captains could have stayed home. They felt a sense of common goal. Right? And so how hard is it? I ask you. To create a sense of shared purpose or common goal in your teams? Like any project that's worth doing, that has any kind of impact on the world around you at all, and is worth the resources of you and your fellow team members, and probably a lot of other resources being marshalled to achieve some desired end. How can you tell me that's not worthy?

KL (22:14): I feel as project managers we're trained to manage our resources and check the statistics.

MH: Yeah, so I was trained that way, and I had what I thought was a pretty good track record of success over a 10 or 15 year PM career, until I learned I was missing something really big all along. And that was, I need to micromanage the process, and I need to stay attuned to the signals on how well the process is working, and I don't need to micromanage anything else. I definitely don't need to micromanage people.

KL: So it's a feedback loop.

MH: As long as I'm getting good, timely signal feedback on how well the process is working, and I'm governing the process, I don't need to do anything else.

KL: So what this governance process was, was to set up an understanding of what the system would look like: we will stage here; we will ask for boats; once we get the boats, we will figure out that it's a pier problem; we don't want to hurt people at the pier while we're trying to save them. We will stage here, it will be about the timing and the rotation of this. And now we need to get the signaling. We need to know the communication of where they are, their speed and their rate. But instead of assuming I have to manage everything, I am simply going to govern systems, and allow people to do it. So now we added trust: enabling those that say they want to do the work, to do the work. An emphasis on single-tasking, probably natural a bit in this, in the sense that their shared goal…How did they do that? Did they reinforce that in any way?

MH: They gave each boat a bed sheet and spray-painted their destination on the other side, either New Jersey or Brooklyn, typically is where the people are being ferried, and that's your route, and you just do that over and over.

KL: Just do this one thing in a system governed by somebody else. And this is what improved the throughput of the overall system.

MH: Hugely. If you're trying to translate this in your day-to-day reality though, certainly that is a possibility. But you know what? You might want to talk to you people about that, because some people really like predictability and stability, and knowing that they can master a few things and do them over and over and over. Some people prefer variety and change and whatever. But you still don't want to change them mid-stream. Right? And I don't want to have you ferrying a boatload full of people across the river, and then tell you your priority just changed. Return to that pier, dump all those people off and go to a different pier and pick different people up. It would be stupid. Right?

But we do that in organizations all the time.

KL: Yeah.

MH: Drop something in midstream that has value. Then go pick up something that suddenly seems urgent, but probably is not of higher value than what you were just doing.

KL (24:54): How did they understand the adaptability?

MH: So the stories that Captain Day shared were pretty easy to imagine, okay? So not all these piers were equipped for all these different kinds of boats.

KL: Oh right.

MH: So some boats were higher than they should have been relative to the pier, and some were lower. And so they had to adapt the way…well is there a way to lower the wheelchair onto this, even if it's six feet? And can we do it quickly without having everyone else wait? And if not, can the boat behind me actually dock with less of a gap? Right? And take care of this, and I can tell them, no, that boat has you. It'll be right here. They can see it.

And then of course, there weren't like ready fueling stations to refuel all these boats.

KL: Oh right, you've got to get a rotation

MH: At the ready. The fueling stations typically were elsewhere. And I might not have the time to go back and refuel and come at the way back. Or if I do, somebody else better be filling in in the meantime.

KL: Right.

MH: And so that was one of the benefits of having so many extra boats respond to the call, was that they had a reserve fleet that had fuel tanks full that could be sent in, even if it was temporarily, to adjust to the fact that you just lost some capacity, to keep that flow going.

Mechanical issues happened, as always do, on some of these boats, and they had to bow out. Again, how do we use the capacity we have to be at the ready to make sure the flow doesn't suffer and that our process stays stable and keeps going faster and faster?

KL (26:28): There were kind of four things that you thought of from a consulting perspective, and in fact, it sounds like the captain that was in charge of all of this, from the federal perspective, was able to play it out: know your constraint; think about where your capacity is, right? That kind of question. You *will* do planning. You have to think through things, at least at some level, and then communicate those things. This idea of single task, which involves trust as well. Once people know the goal, let people figure out what they need to, and again, there was a communication around that though, that was important, that they could signal where they were. And then finally, allowing the adaptability that's needed, which is part of that trust question as well.

MH: Right. And these four, in my mind, can and should be codified in every project portfolio environment.

KL: And you're suggesting we don't do enough of that.

MH: I hardly see it anywhere.

KL: How would you codify this?

MH: So you know what I see typically is, Let's just throw our resources at the problem, let's keep everyone busy, and eventually everything will get done.

KL: Throw more resources at a problem. The bigger the problem, the more resources we need.

MH: And if there's pressure to launch more projects, which in the scenario of the 9/11 rescue, would be launching more boats to rescue more people.

KL: Right.

MH: Sure, let's go launch them. Even though we may well be just worsening the traffic jam in the process. So I think it would be so simple; it would be far simpler than reading the 600-whatever page PMBOK®, trying to pass the PMP exam, right? To just say, well, understand my constraint. In many IT organizations, for example, it's often your most senior expert architects, in concert with your most senior business domain experts, who have day jobs, and don't work on projects full-time

as a rule. And the limited capacity that those people have to drive project success is massive. So it's limited. Don't try and move faster than those people can support, because you'll make process and design solution decisions that are wrong. Suboptimal. You'll keep a lot of developers busy, doing lots of rework. Maybe nobody will die, but it's a great way to tank an organization.

I think a lot of us have been on that congested highway, waiting for progress to happen, waiting for those key resources to lend their wisdom in a key phase that we need to go forward and avoid rework.

KL: Should we be having in the sense of then of a kick-off meeting, the kickoff might be around getting those guesses out. Letting people voice what they're thinking on that. I never thought of it that way. What a way to structure…

MH: That'd be fantastic. And so often in the project world, we find ourselves, and this is traditional project management, this is Scrum, this is whatever your methodology, so often we find ourselves in the situation, "Oh, that's an issue outside of our control, we need to escalate it."

Well wouldn't it be great if we didn't have to escalate it. We already had that direct line of sight link to a governance process that was already designed to promote maximum flow, and set us up for success, and there's no, "Oh yeah, I better go get on the boss's calendar two weeks from next Thursday, and with any luck, I'll get five minutes on the agenda, and then I'll get back to you in a month, and then maybe we'll have it solved. No, this is a system set up so that the moment there's a signal saying, "We're getting ahead of ourselves here. Okay, we can ease up on the throttle." Right?

KL: So, so important to identify where the choke point is and how we will know the rate of the process, how we're doing that signal is so important.

MH: Yeah!

KL: Those two things are what are needed from the governance side.

MH: And so simplifying.

KL(30:12): So when we look at this in hindsight, we seem to measure it that people got off without a lot of hurt.

MH: There was not a single injury reported on any of these almost half million people being rescued. I've got to believe that they received all sorts of commendations. And certainly, if you watch the video, you'll see quite a few of the folks that did pull it off say, "Hey, this was the highest impact day of my life. Of all my years on the water, trying to do great things and help people and be a high-impact professional, there's no question that this was the day that I contributed the most, and I felt like I was a high-impact player.

And if you think about it, isn't that what you want your team to feel? And when we're part of a low-performing environment, we know it. Usually most of us know, "I could go a heck of a lot faster if the system were promoted and protected and governed well." And so I think so many of us just want to be part of that system. And if you as a leader can create that system, think of the positive psychological impact you'll unleash in your organization.

KL: As project manager, your job is to govern the larger systems. Don't get bogged down, micromanaging resources and personnel. To contact Mike or read his blogs, go to fortezzaconsulting.com. You can find his book, <u>The CIO's Guide to Breakthrough Project Portfolio Performance</u> on Amazon, and you can watch the video "Boatlift: An Untold Tale of 9/11 Resilience" on YouTube.

KL (32:03): Shaun Simms is director of supply chain operations and compliance at Express Groups, and is currently on the board of directors at PMI Metro St. Louis. He's an award-winning project manager and is particularly intrigued by the power of projects to change the world.

He became interested in the Bus Boycott of Montgomery, Alabama, after reading Martin Luther King's biography, and went on to write a series of articles about the thoughtfulness and project-style planning and strategy that went into the boycott. The Montgomery Bus Boycott lasted from December 1955 to December 1956.The product was desegregation; the customer, the American people.

KL (32:39): It's a well-known story. So I thought maybe you would give us some of the bare outlines, lo these 60 years later, about what actually happened. What is the nature of the event, and it's importance? And then let's dig in a little bit after that, around the project management aspects, because that's the interesting thing for our purposes today, is to see that application.

Shaun Simms: So Montgomery was a place that they often called the Cradle of Confederacy. When they were forming the Confederate States, that's where they began. And in this town, segregation, like a lot of places in the South, was a way of life. The schools, the restaurants, everything was segregated. The buses were no different. The white passengers would sit in the front, the African-American passengers would sit in the back. And if at any point a white bus rider would need to sit down, those who were African-American would be told to stand. In this case, that had happened for years. And December 1st, Rosa Parks refused to do that.

She was asked to move. She did not. But what a lot of people don't know is, this isn't the first time that actually happened. But this was really the precipitating factor of the boycott. She had been a member of the NAACP, and so they said, "It's time to boycott this." And that's when I call, kind of Phase One of this project began.

SS (34:25): Phase One was really only the first three to four days, and then really the next, over a year, was what I call the second phase of the project.

KL: So we have her arrest, and then we have the boycott starting.

SS: So she was arrested December 1st. The first day of the boycott was December 5th.

KL: Right.

SS: After E.D. Nixon posted bail, the next day, he called Ralph Abernathy and Martin Luther King, and said, "It is time to boycott. Let's make it next Monday." So the work was beginning and had to happen fast.

KL: That's very fast.

SS: That is very fast.

KL: So do you have a sense of magnitude on that?

SS: I've seen a lot of different numbers. 17,000 to 30-40,000 individuals that they're trying to communicate to in 1955 to make sure that they don't ride the bus, that they actually boycott. So trying to think of a plan to do that in three days…

KL: Right. Without email.

SS: Without email. Some people even have no phones at that time. The Women's Political Council, which is a group of prominent African-American women from Montgomery, said this time we're behind you. And they said, "We will do our best to try to get some information passed out." Leaflets. They passed out thousands of those. Then the next day, they immediately called as many of the pastors as possible. They figured one of the best ways to get this out was to say it in church, Sunday morning, before the Bus Boycott, because a very large portion of African-Americans in Montgomery attended church.

Luckily, there was a couple councils that were going on, where all the pastors happened to be, so they actually went and talked to 12 pastors at one time. And quite a few women and children volunteered to pass out those leaflets. They were actually aided unintentionally by the newspaper, the local newspaper. A woman, who was a maid for a white family, had been handed that leaflet, didn't know what it said because she couldn't read. She gave it to her employer, who wanted to alert the media immediately of what was going to happen. So those who did not hear about it through church, those who did not get a leaflet, could read about it Sunday morning in the paper. And to be able to reach out to the whole African-American community in Montgomery in a matter of three days in 1955 is unheard of.

KL (37:20): So there's a question, are we asking people not to go to work? And what are the implications of that?

SS: In this case, they realized the risk of, Well, we can't just boycott. How do we actually help these individuals get to work who need to? One of the things they did was reach out to all of the African-American taxis and said, "Would you be willing to charge 10 cents, instead of 45 cents, for fares for individuals who normally ride the bus, but are going to be on this bus boycott?"

They had unanimous agreement from all the taxi drivers in Montgomery that were African-American. So Step One was, they let everybody know that that action is possible, that you can get into a cab and it would only cost you the same as a bus fare and not as much as a taxi. Some individuals said that they would be willing to drive, it was kind of spontaneous at that point, and then a lot of people, honestly, they just wanted to walk. It was a pride thing. They'll walk six miles to work. They'll gladly do that to help put an end to these injustices.

KL (38:37): So it kicks off, successful out of the gate. Martin Luther King watches the bus stops, and can't believe the buses are empty. He had hope for the best and he got more.

SS: They said they saw no more than eight African-American passengers on the buses combined that day. They had assumed that they had gotten 99% participation in the Bus Boycott. And then they had called a meeting that night at one of the larger churches of Montgomery, trying decide, Are we going to continue this? What are we going to do? There's a lot of risks response here, like, do we…

KL: It was really just for the one day.

SS: It was the one day. So they had to decide, depending on how went day one, and the determining factor was how many people showed up to that meeting on Monday night to talk about it. And it was completely packed. People were out in the streets. Hence they said, We're going to continue forward with this. Similar bus boycotts had happened in like Baton Rouge, and a lot of the information they figured out on how to at least set up and organize a bus boycott came from information that they learned from that. Montgomery though, as we talked about…

KL: So we have lessons learned.

SS: We do. And pass them along.

KL: Right, and read them at the beginning of the project.

SS: Yup. And so for me, those first three days, where you have to make the decision, you have to determine exactly what you're going to do, you're going to have to issue some planning and risk around the idea that individuals who took the bus can't take the bus anymore…

KL: Right.

SS: How do you get them to where they need to go?

KL: Risk planning, risk mitigation going on.

SS: All over it, absolutely. And then the unbelievable communication to all of your significant amount of stakeholders was brilliant.

KL: The decision to do it. Risk mitigation. Communication through the nodes, through the pastors and that stream. Then it also sounded like we had some teams of teams. In other words, there were different groups of people who'd been mobilized for various reasons, politically and socially, and now they're beginning to coordinate, and say, Yeah, we'll back you, we'll support you. We can do this here. So…

SS: Yeah.

KL: … there's a cooperative element at the leadership level that sounds pretty stunning.

SS: Yup. So there are those different…

KL: It's like a PMO, almost!

SS: There really is. You have those women, even though the PMO, in my mind, was at that time being led by Martha Luther, E.D. Nixon, and Ralph Abernathy, it was the women that were almost the sponsors of the project. They were the ones who said, "Yes, do it."

KL: Because they already existed it as an identity, as a group, politically. You know, this strikes me, too, since they decided to move on, I want to say it's like they ran a pilot, or there was a beta version, but really this is a little bit like Agile development. Try it. See. It's amazingly successful. What do our stakeholders think? Make the next decision.

SS: Yup.

KL(41:35): So as this roles through the year, what are some key events and how we interpret him from a project perspective there?

SS: I think the first thing that they do, which is key, is they realize, if we're going to do this, we have to have some organization, some formal organization, so they create something called the MIA (Montgomery Improvement Association). And they realize there's some things they need to do:
1. Transportation is by far the most important thing that they're going to have to figure out long-term.
2. Communication.
3. To run all of these things, they have to figure out finances.
4. They have to have a strategy group to figure out long-term what they're going to do, and that group often responded to risk throughout the next year.

And these groups got pretty large – had full-time staff.

KL: So this is about driving to a larger desegregation question, then, at this point. Did their scope expand? Is that how I'm reading the history?

SS: So their initial requests were three really kind of basic requests:

1. That the buses provide courteous service to all of their passengers.
2. That there would be no assigned seating, and they even said that African-Americans would load from the back of the bus and white citizens could load from the front of the bus.

KL: Just fill it up…

SS: Just fill it up on a first come first serve basis, that was point two. And then three was,
3. Since 75%-ish or so of the bus riders were African-American, that they hire African-American drivers on predominantly African-American routes.

Those were the three requests. That was their scope. It changed a little bit over the course of the year, but significantly, those three things are the things that they wanted. The third one, they changed it to say that those individuals driving the buses right now, they have their jobs, they didn't want to take away the jobs that individuals had right now. But should there be an opening, that African-Americans could apply for and potentially get.

KL (43:53): So continue with the story. So it goes on into the spring.

SS: Yeah.

KL: It gets hot, now we're in the summer.

SS: They tried to figure out a strategy in regards to transportation that would work for everyone, and so they set up over 40 dispatch stations and over 40 pick-up stations throughout the city, and they communicated all those to everyone who needed to ride the bus. They also had five to seven large meetings simultaneously with the same message. Every week you'd have thousands of people in one of those large churches, hearing about what's next, what's coming. There might be a risk.

One of the risks, again, was when the MIA was in a meeting with the city leaders, one of the city leaders said, "I'm pretty sure there's a rule that if you're a taxicab driver, you have to charge at least 45 cents." That right there put an end to that ten cents. Absolutely. So they asked everyone at their church, can you give your car? Can you drive before or after work? And so they set up these four-hour shifts, really, in the morning and opened up their church at 6, a lot of churches were pick up stations. In the, what we'll call the white part of town, they had 48 different drop-offs, pick-ups. And that project plan of, there's my risk; I've assessed that risk, it's going happen. What is my risk response strategy? And getting that to work within a week, and setting up those dispatch stations and pickup stations within a couple of weeks to run so well… The White Citizens Counsel actually said that it moved with military precision.

KL(45:42): So now we have the... The buses are still being boycotted.

SS: Mmhmm.

KL: Presumably they're running at a loss, but they are running.

SS: Yeah, the bus line did not shut down. They actually asked for a representative, a vice president from the bus company to come down and talk to them because they felt like they really had a place to sit at this table in regards to discussion of how their buses are run. And they finally catch up to him, and they plead their case. But there's one individual, the town lawyer we'll call him, who says, "There's no way we can make your proposal work in our city laws. It's just not possible. Sorry. Our segregation laws are clear, and this won't work. That was their…

KL: So then the bus VP is like, my hands are tied, it's a political issue.

SS: Exactly. And at the end of that meeting, after some of the reporters left who had heard about the meeting and were there covering it, they basically said, "The reason why this can never work is because we will never have a black man boast of a victory over a white man, here in Montgomery." So, it was more than just, "Hey, the laws." There was an entrenched racism in that group.

But again, a good project manager hears this is a risk, this is a concern. So he goes back, he says, "When this bus boycott is over, we will not boast over our white friends. We will not rub this victory…"

KL: Who says this?

SS: Martin Luther King.

KL: Okay.

SS: He wants to make sure everybody's on point. This isn't a victory over the white man, it's a victory for justice.

SS (47:29): In any kind of large transformation type project, you run into things that are going to cause issues. In this case, you have these city leaders who refuse to let the African-American community win a victory over the white person, as they said in their own words. And so they run into acts of violence to try to bully them into stopping. The KKK is doing a lot of letter-writing and calling Martin Luther King's house. They also bombed his house. Martin Luther King had to stand up on that front porch that had just been bombed, and say, "We're all fine. Do not live by the sword because you'll die by the sword. We must have a nonviolent response." And they did.

KL: It's his strategy and he's staying on message as well. Both.

SS: Absolutely. And, unfortunately, some of those bombings continued. So there were definitely tactics from a negative stakeholder point of view, because those individuals were stakeholders as well. They tried a "get tough" policy, where they were arresting people for pretty much no reason. They found this law in Alabama that says you're not allowed to boycott a private enterprise without justification, for the point of…to put that organization out of business.

KL: So we do have the world watching now, that's a key point from the Civil Rights progression.

SS: Yeah. So they had donations come in as far as Tokyo.

KL: So we got finances.

SS: Yes, yeah. At one point they had $250,000, which was a significant amount of money. They needed a lot of that for their sizable staff, to make all of this run. It became a significant organization. They actually had a lot of difficulties finding places to have their offices, because any time they would try to go there, the city fathers would say, "You're not technically allowed to go there. If you stay there, we're going to take away your funding, we're going to take away your license, we're going to revoke this or that..."

KL: Wow.

SS: And so they eventually ended up in a union hall.

KL (49:52): One of the other new risks that got opened for them was actually going through the courts. Well, risk for everyone, I guess, because you don't know the outcomes.

SS: It went to a regional court that had three judges ruling, and they actually ruled in favor of the Bus Boycott and ending the segregation on the buses, two to one, and then it went to the Supreme Court who agreed with the Lower Court's ruling, that bus segregation was indeed unconstitutional. And interestingly enough, on one of the days where they were convicting Martin Luther King and a lot of other individuals, was the same day that the Supreme Court said that it was unconstitutional. So, while they said that, "You must end the bus boycott on this day," the underlying factor and

reason why there was a boycott, was overturned.

KL: So the court decision comes down, what? November '56?

SS: Yup. And they think it's going to take just a few days.

KL: So something goes on for five more weeks or so.

SS: It takes a lot longer than they thought. And since they had already determined that the bus boycott needed to stop, but more specifically, in that case, that the car pool was not allowed, that it was against the law to do so, they had to figure out for that next month, how to get people again to and from work without that carpool.

KL: So they didn't want to stop the boycott because it was still, essentially, Montgomery was not following the rule.

SS: Yeah. Until it was passed down and made effective in Montgomery, they didn't want to stop. But they had been told that they need to stop and, more specifically, that that car pool was against the law, and anyone caught doing that would be going to jail.

KL (51:56): So sometimes your solution is now become outdated or you have to change solutions. So what did they do?

SS: A lot of people honestly went back to walking. And they said, "We think it will only be a few days." After, probably five days, they went back to the drawing board, and they had to change their communication strategy, right? Because if you're waiting day after day after day, that seems like a long time. And so they kind of changed that message to, "It could be the end of the year before this happens," which I think is a really important part of project and schedule, right?

If you say that you're going to have a deliverable, and we're going to have this project end on November 23rd, right? And then each day you're like, it could be tomorrow, it could be tomorrow, it could be tomorrow… Every day seems really long, and it's very frustrating. Reassessing, and saying, "Hey, looking at this, it's going to be the end of the year," you as an individual can prepare yourself for a little bit longer.

KL: We're back to expectations management of your stakeholders and of your project team in a sense, right? Understanding what things *could* be and how they're going to work out. So it ends when?

SS: December 20th.

KL: And why that day?

SS: Because that's when the law had been officially applied in Montgomery, and they desegregated the buses there.

KL: Right.

SS (53:11): So one of the other things I thought was really cool, and this was the change management aspect of it. So something that they did was, they, again, wanted to have a very clear message. This is not a victory *over*. You will not boast. You can expect some violence. Do not respond in violence. They even went so far as, if there's an open seat, just for the change management factor, you don't need to go sit right next to a white passenger. Because they're…

KL: They're trying to avoid antagonizing during this change period.

SS: Yes. What they also did, which I thought was really awesome, is, they actually did role-playing scenarios at the churches.

KL: Wow.

SS: For like three weeks. Up to that point, to say…Up in front of the church, they would have chairs, like they're sitting in the bus, they would have someone come up and start to antagonize and say, how do we respond? How do we do this? So they, from a change management perspective, they were preparing the African-American community for all the possible outcomes of what this change really meant.

I would have thought, "We did it! Great!" and then just go about the business. But they're like, "Listen, there's going to be a lot of individuals who aren't happy with this, and so if you think that starting Day One, things are going to be peachy, they're absolutely not." There's going to be conflict, there's going to be issues. One of the things that the city fathers said was, "There's going to be violence, there's going to be bloodshed." And as Martin Luther King says in in his book, he's like, "And bloodshed, there must be."

KL: So for you then, in summary, when you're thinking of it as a project manager, what do you see as the lessons for anyone trying to cause change? Be it through a product or a service, whether it's a social movement or not. From a PM point of view, what do you interpret as key things to continue to think about?

SS: So I would say a couple of things. Project leadership, that vision of where you're going, lead with vision is vital. If you're not trying to lead with vision, if people aren't on board with your vision, if your vision is fragmented, then you're going to lose people, they're not going to be behind you. So he was clear on the requests of what they wanted, what the end goal was. He constantly preached nonviolence as a means to do that, so everyone knew what they were doing, what they were driving towards, what the end goal was and what success would look like.

Their quick planning, the way that he would think through this project landscape. He says... Now that I know this, now that we are going to move forward, I know we're going to have finances that comes in. We going to have to set up a committee, we're going to have strategy, we're going to figure out how to respond to individuals, and what our plan is going to be going forward. We're going to have to have a transportation committee. You have to organize across all of those, you have to have incredible communication to all of your stakeholders, a significant number in a time when those means were not nearly as easy as they are today, and then you have to cross coordinate through all of those.

You have to think about risk management, both external and then internal. There was some internal

turmoil as well. How do we handle that? How do we get people on the same page? How do we respond to the internal...when you have that many individuals trying to work for a cause that you're inevitably over…

KL: Internal stakeholders. Because you have agendas everywhere.

SS: You do. You do. And how do you handle all of this? And execute and be agile enough to respond to anything that's going to come up that might shift the way that you're operating? Because you're exactly right. There's times when they have to respond to, "We can't take a taxi for 10 cents anymore." Then there's a time when what they have set up for their carpool isn't legal anymore, and they have to come up with something different. So, agile enough to think beyond that and think about what the next step would possibly be.

And then listening, I think is really important for project leaders. And every one of those meetings with the people that, who would be easy just to tone out because we can't stand what they're saying, but something that Ralph Abernathy and Martin Luther King, Jr. would always do is try to pick up those cues of what their next steps are going to be so they could respond to them. And having that kind of clarity of courage is really important.

KL: So obviously, strong leadership was key to the success of this project, along with the strategic communications network with clear messaging. Also, listening and adapting were critical. The leaders listened to all of the stakeholders, even to those whose purposes were anathema to them, and they adapted their strategy as they went along. I'm particularly impressed by the change management activities, as painful as they were, that they staged at the end of the project to help the community ease into the new reality. It reminds us that the project isn't over when the activities are done, but when the results are evident.

You can find Shaun's articles on LinkedIn. Shaun M. Simms.

I hope these stories have inspired you, project managers, to approach your projects with the skill of leaders in the moment, as Martin Luther King and Captain Michael Day showed themselves to be. Assume the mantle of leadership. Set clear goals. Communicate coherently and effectively. Set constraints. Adapt, adapt, adapt as events change. And motivate your teams with a focus on the results.

Special thanks to my guests, Mike Hannan and Shaun Simms.

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I'm your host, Kendall Lott, and until next time, whatever the size or urgency of your project, keep it in scope and get it done.

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