76. Culture and Fit from the 2020 UMD Symposium

with Nikola Ivanov and Wendy Wickham

Kendall Lott: Well, PMs, it's that time of year again. Welcome to our third series of highlights from the University of Maryland's annual project management symposium.

2020 was markedly different than years past. Covid made it virtual. Overnight. And our episodes will be a bit different as well. It turns out there are advantages to having a virtual symposium. You can include a more international crowd, as presenters as well as attendees. And thanks to video conferencing, all the presentations were recorded and are available for viewing, even now. So this year, PM Point of View® is taking you farther, as we give you excerpts of the presentations, along with follow-on interviews with the presenters, to get even richer detail and context. For this episode, we focus on culture and fit. And if you're liking what you're hearing, go over to the symposium's website at PMSymposium.umd.edu/pm2020. And for $125, the original attendee price, you can listen to all 57 recorded sessions at your leisure. Download the presentations, if you like, and earn up to 44 PDUs. 125 bucks. 44 PDUs. All on your own time. Project Management Center for Excellence indeed.

Nikola Ivanov: What I'm trying to do is evaluate a candidate as a whole. It's a limited amount of time to determine who this person is. The idea is to find out what are the risks associated, and how am I willing to deal with those risks?

Wendy Wickham: And what makes, I think, observing so powerful is that I'm not just looking for, Are they going to resist? But I'm looking for, Okay, now how can I help them? Where are their points of resistance going to be most likely? And how can we bridge that gap?

Kendall Lott: An organization is essentially a conglomeration of individuals, right? Together they embody a unique social structure with a distinct culture. So it matters whom you hire, in the holistic sense. It's not simply a matter of whether or not someone is qualified for the job. Even more important is, Will they fit in?

But wait, there's more. In this episode, we learn that the project culture itself has to fit with the larger organizational culture, and where evaluating those gaps can help you see where projects may tend to run into trouble or be empowered by the organizations they exist in. This is culture as a critical success factor to project completion, success, and value. Nikola Ivanov and Wendy Wickham outline helpful approaches to hiring and stakeholder management.

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 is your host, Kendall Lott.

Kendall Lott: If culture and identity are essential to how an organization functions, then to achieve and maintain success, the leaders must make decisions and define processes with organizational culture in mind. Nikola and Wendy offer very explicit steps for optimizing your team's capacity and your project success by fostering individual alignment with the culture, and then project alignment with the culture. We move from the psychology of individuals to the sociology of teams that work within organizations. We have to recognize as PMs that we are hiring managers. We are deeply involved in what is traditionally an HR role. So take it on and get it right.

But what is right? Nikola shares his approach, which emphasizes the importance of fitting in at the individual level. Choosing and keeping the right team members, focused on getting to this from a design perspective. For him, this is just as important as the technical competencies and outcomes for a person. He describes how to conduct more insightful candidate interviews by approaching them from a non-traditional angle, and reminds us to link what we expect in current employees to what we would expect in our new employee. And then keeping the key players.

His presentation is based on two books, “Who,” by Jeff Smart and Randy Street, and “Radical Candor,” by Kim Scott, and he gives specific pragmatic steps for tightening this connection between the culture and expectations you need and the candidate you select, who then becomes and stays an A player.

Nikola Ivanov (04:12): My name is Nikola Ivanov, and I am the Director of Operations at the Center for Advanced Transportation Technology Laboratory at the University of Maryland. And what I actually do is I'm responsible for all of the operations at the lab, which means all of the projects that are being worked in the lab, all of the processes being developed at the lab. Hiring and staff management. Some business development. A little bit of everything.

KL: How many staff do you have?

NI: We're at about 55 professional staff, and then a varying number of interns, and we also have a contingent of PhD and postdoc researchers.

KL: Did you ever think that you were going to be focused on HR at all?

NI: No, no. HR was not anywhere in my road map for my career, but it's become one of those key pieces that don't make anything else work if you don't do it right.

NI (05:23): So we often get lost in this idea of “what” in our daily work, but “who” is really what can make an organization, regardless of what your mission or a domain of operation is. And this wasn't necessarily evident to me for a long time. We've had some extremely talented staff over the years that, they were brilliant minds with some brilliant ability, but their personalities sometimes clashed, and that resulted in all kinds of issues. Toxic culture. Rumors. Things like that. And we also had people that were just a joy to be around. They were great people, but their performance was inconsistent.

And so overall, it wasn’t evident to me that we were lacking that “who.” I was so focused on “what,” and how do we get there, that I didn't realize it.

KL: What do you mean by the “who”?

NI: In a nutshell, the “who” that I think of is, “Who is the right person for the job that I'm looking to do?” And that right person, there are many different dimensions of that right person, and I think the key is to pick the best person for that job.

KL: And I think that's a lot of what you were discussing in your presentation is, “What are those dimensions?” You described about how you worked so hard to get the right type of person for the job in the sense of the “what,” and then you ended up in agony. And it was fear. “I was afraid.”

NI: I was afraid I do a lose their brilliance and expertise and capacity they were bringing to the CAT Lab as technical people. Or I felt bad because they were a great person to be around, like I mentioned. Or they were maybe in a bad position in their life, and I felt that letting them go would just make that worse, and I just felt terrible about it.

NI: But for the cost of these mistakes was enormous. Financially, psychologically, and culturally. The overhead of onboarding a person and getting them up to speed and learning everything, just to realize they're not a good fit, and then doing it all over again, is very expensive.

There's also the fear of loss of capacity and institutional knowledge and expertise. And who would take over for this person who built this particular piece of software? Who would be able to understand it and keep it moving? And so I had to grapple with this idea that I hired somebody that I thought was brilliant and a great fit at the CAT Lab, and it didn’t work out. That was my fault.

NI (07:41): An interview process only gets you a small glimpse of who the person is. And sometimes that can be misleading or deceiving in some way, not because of that person, but of the view that you have of that person. And it's not until they're on board that you realize that maybe they're not the right fit.

And so what I embarked on is establishing a new process that’s a lot more rigorous, but also repeatable. It wasn't a gut instinct. It wasn't, “Oh, I like this person, and I can talk to them very well. It was a lot more objective in my opinion, as much as the whole process is somewhat subjective.

So this is based on the idea of a A player – a candidate that has at least 90% chance of achieving set of outcomes, that only the top 10% of possible candidates could achieve. Not only do you need people that can do the job, but you also want people that are best at doing that job. So there are four components of the “who” process. There’s the score card; source; select; and sell.

So the score card tells you what you the person to accomplish in this role. This is not a job description. This is a way to see what it is that you're trying to accomplish. These are clear and repeatable steps.

Source is a systematic way of bringing people in. And, oftentimes you want to identify people before you even have a need, so that you have a consistent pipeline of talent that’s available to you when you have a need.

Select is a series of structured interviews to gather as much relevant information as you can about the individual you are looking to hire.

And finally sell. So how do you persuade them to join? At the end of the day, you're identifying A players, but those players are also identifying A companies to hire them. They don’t just want to work for whomever. So how do you identify an A player, and then how do you sell your organization to them?

The intent is that this process actually works on all levels of the organization. You could hire a CEO based on this process. You could hire a VP level person; you could hire a software engineer. And you can also hire people that are in customer service, for example. You can use the same components of the process.

NI (09:59): So let's talk about each part of this process. So we have the score card. The score card contains three different pieces. There's the mission, outcomes, and competencies. The mission is just plain and direct. It needs to be not a convoluted, some kind of a pie in the sky thing. Outcomes is what you need that person to accomplish. So this is not a job description. A job description has a bunch of stuff, it's a set of activities that a person might be taking on, and so on. Outcomes are very specific, and often time limited. So what do you expect this individual to accomplish within the first six months or twelve months? Specific outcomes that tie back into your mission. And finally, competencies is your tie-in to your culture. How is this candidate expected to operate within your culture? How are they going to reach these outcomes, as they are integrated into the culture? And the idea behind the competencies in the score card is building a consistent culture over the time. So you're still attracting a diverse set of candidates, right? You have people with different levels of competencies or different levels of skills and expertise, different backgrounds, different personalities, and so on. But this competencies piece gives me an idea of how you maintain a consistent culture throughout the organization.

In fact, one of the things that you can do with this score card is, it can be the basis for your performance reviews. It flows very well as performance reviews, because the employees now understand what are the expectations, what are the outcomes they're expected to accomplish, and at the same time, those outcomes are somewhat binary. You either did it accomplish it, or you didn't. Now, you can talk about why you did or didn't, but at the end of the day, it's very clear whether or not your meeting those expectancies.

KL: Was this in fact related, or did you go through a process of relating it to the values of the organization?

NI: So it was a bit of an iterative process. We weren't developing values to support the hiring, and we weren't developing a hiring process based on the values we were developing. I think the two were kind of moving along in parallel, and what we realized is the values that we were forming to evaluate our current employees was actually a blueprint for what we were looking for in future employees. And so we realized, Well, wait a minute. If we're evaluating our current employees based on these values, we should probably evaluate our incoming candidates along the same spectrum of values.

KL: Those competencies were pretty broad though. Like efficiency, work ethic, work quality and enthusiasm. How do you measure those?

NI: Those are not necessarily easy to measure. That's why they're competencies, not outcomes. I think the key here is, with outcomes, they're clearly measurable and they have a time allocation for them

KL (13:02): So the first step in the hiring process is sourcing. Where are you finding your candidates?

NI: Traditionally, the way we've done it, and many other people do it, you post a job description, and you wait for candidates to apply. Sourcing is described in the book, and the way we implement it is, it turns that process from being static to more of an active, proactive approach. So the idea is that everybody in the organization is empowered to be a recruiter. Anybody in the organization isI welcomed and encouraged to recommend their friends, acquaintances, people they've met over time. The quality of candidates that come through referrals is much higher than what you might get from the static posting on the web.

KL: Were you able to get people to assist you in that way, when you talked about getting your staff to be part of this?

NI: Yes, everybody in the organization is a recruiter, and that's actually going back to the comment I made earlier of building a particular type of culture, and seeing whether or not the hiring process has worked over time. What we found is that we have more and more people volunteering and bringing people to us and saying, “Look, I have a friend or I have an acquaintance, or I know of this person that's really good at something, and maybe we should recruit them. So the fact that people are looking to bring in other people into the organization, without any kind of a financial incentive for doing that. So the idea here is that they value the culture they operate in, they want to bring in others, and they want to bring in people that will thrive in that culture as well, which continues to feed... You know, it’s a feedback loop, it continues to feed that good culture.

KL (14:48): Once you've sifted through all the resumes, you go on to the next phase, a series of interviews to dig deeper into the inner candidate to find out who this individual really is. First there's the initial phone screen. After that, the “who” interview helps you sketch out a timeline of their career trajectory up to the present. The focused interview is where you truly uncover their strengths and weaknesses. And finally the reference interview, which doesn't include the usual suspects.

NI: Then I move on to the phone screen and screen out, your B and C players. So, it’s often fairly quick, to determine whether a person will meet the score card requirements that you have on the phone.

The other thing that we’ve introduced is a technical interview, and the reason we did that is that most of the people we’re hiring are technical software developers. And so the idea is, that we will test their technical skills, right up front, because those are important.

“Who” interview is where I really get involved, and the idea is to learn how they got to where they are today. And the way that I execute this is, I look at their career, and I talk with them through that career in a reverse chronological order. So what that means is, if they had four jobs in their career, I would start to the earliest job, and I'll ask them five questions about that job. And then I’ll ask them the same five questions about their next job, and the same five questions about the next job.

And what that does is, it actually shows you how they progressed through their career. And things that I look for are, were they pushed out? That's an indicator of potentially not being a good fit for those positions. Were they pulled up? Right? In the organization, did they constantly rise to the next level because they were very effective in what they did? And what was that trajectory? Did they remain technical? Did they move into management track? How did they move to that? And then finally, why were they looking to leave? There's a reason somebody looks to leave an organization and they're all often very valid, but understanding how they move through their career, provides a lot of information.

KL (16:54): We moved to so much behavioral interviewing, now, like tell me a time when you did, or how did you operate when you did? But I really like this "who" interview. You talked about learning how they got to where they are. Have you found people are responsive to that?

NI: Yes, I have. And the reason that I think it works is that it turns into a story, right? A typical interview may be a lot of question-answer types of things, and you're always trying to answer questions in a way that makes you, puts you in a favorable light. When you're just narrating a story of your career, of your life, it's much more genuine, and you tend to share information that maybe you otherwise wouldn't, that might be beneficial to you. Because it's genuine information, and it provides a better view of the person, as opposed to pre-canned answers to interview questions.

NI: Then we move on to the focused interview, which then focuses more on the alignment of the competencies in the score card, so that's the culture fit piece. And the idea is, it sometimes gets awkward, but I ask some very tough questions.

Now, everybody in an interview has a pre-canned answer to, "What are your weaknesses?" Right? We all practice that before an interview, and we have a bunch of strengths that are disguised as weaknesses for an answer. So the wording of asking that question really matters. I often ask them, "What are they really bad at?" Or, "What would they not like to do if I hired them and gave them a task?" And I'll be very specific. I'll say, "I'll give you a task tomorrow if I hire you. What would be that task, if you were to look at it and say, 'Oh that's not what I signed up for. I don't want to do this'" What is that?

Sometimes they'll try to spin that, and they'll have to think about it, because the wording is different. So they'll try to spin it again as a strength, and you continue the press them. So I'll ask them again, "Well, that sounds like a strength. What are you really not good at?" And eventually you'll get to the point where you get some very honest answer as to what they might be struggling with.

The other thing that I do in this focused interview is I'll ask them a question. I will say, "*When* I talk to your previous boss or peer, what will they say about... Whatever? And note that I'm not saying "*If* I talk to your boss, what would they say?" I'm saying "*When* I talk to your boss, what *will* they say?" That wording is nuanced, but it makes a difference, because in their brain, suddenly they're thinking, "Okay, well, this is not a hypothetical, this person really will talk to somebody that I interacted with, so I have to be a lot more honest about what that person might say." So then, in that focused interview, you get a lot of what I would say valuable information that relates to their…the culture and the competencies that you were trying to look for.

KL: Are they responsive to that and how do you handle the negative side of that kind of conversation?

NI: So the responses to that vary, and that variation is an indicator in itself. If I was to say two broad categories of responses are, one, they resist the question. And so they end up saying something that kind of answers the question, but not really. And I'll push for it for a little bit, and if I see that they're just completely resistant, to me that indicates that inability to maybe be genuine in terms of admitting where they might have some weaknesses, true weaknesses, or ways of dealing, in terms of emotional intelligence, ways of dealing with difficult situations.

And the other category of answers, are people that are going to stop and think about it for a few minutes, and then come up with an answer that's in scope of their career story. Again, it's a narrative, and now they're telling a story of something that's been challenging to them, and again, because it's a story, sometimes exposes both positive and negative outcomes of that, where they might have actually dealt with a situation that on the surface to them was one way, but the way I hear it from them, I realize they have reacted to it in a way that's favorable to me and the organization as a person, or maybe it's a way that I don't want somebody to react to an adverse situation in an organization. So again, it's a very telling type of a question.

NI (21:20): And then finally, we go to the reference interview, and you go beyond those listed references. And this is a bit awkward, because references that are on the application are pre-screened in some way. They've picked these people for a reason, to provide them with a good look for the interview.

So a lot of times I will ask them, and put them on the spot in an interview, about people that maybe they reference in the verbal interview. I'll say, "Can I contact that person? I would really like to talk to that person." And it's a tough question because if you say no – and there are valid reasons to say no, and that's okay – but also sometimes, you'll want to say know because you're not sure if that person will give you the glowing review you're looking for. On the other hand, maybe they will and you're excited to share that information.

The idea in this selection process isn't to find the "Gotcha," I'm not digging for dirt for the sake of dirt. What I'm trying to do is evaluate a candidate as a whole, right? It's a limited amount of time to determine who this person is. The idea is to find out what are the risks associated, and how am I willing to deal with those risks? Some risks that may appear huge to an individual may not be something that I'm terribly worried about, because we can work through that. And there might be things that the person exhibits that things are okay, that are red flags to me. So again, it's not a "gotcha." It's a more of a holistic view of that individual.

KL (22:50): After you've selected your ideal hire, it's time for the final phase. How do you sell this opportunity to that A player?

NI: Once you go through that selection, you've identified your A player. Now you have to sell it. Right? And the selling points are fit, family, freedom and fortune, as well as fun.

So a lot of times you talk about financial incentives. That's an obvious factor, but that is not the only thing that motivates people. Fit is how well they fit your existing culture. How excited are they about your culture? I will tell you, as awkward as these interviews that I just described can sometimes be, a lot of times I'll have people that tell me, either immediately or after the fact, that they were really excited about how I posed the interview, because it was a lot more personal. It made them be more honest, but it also made them think about what it is that the organization is looking for. Is this this really for me?

Family. If you're asking someone to move across country, you're not asking just that individual. You might be asking their spouse, or partner, their kids to buy into that as well. You have to acknowledge this, and you have to help them make that decision together. Because once you identify an A player, you inherit everything that comes with that A player.

Freedom is the big one. We found that a lot of people will forgo stronger financial incentives for freedom. Over the years we've hired some brilliant experts with decades of experience that I thought would never come work for us because we couldn't pay for what they were making in the position they were in. But they were so excited to come to us because they had freedom to be the expert they were hired to be.

So all I will say is it's a challenge. A lot of times we'll be hiring for a position and we'll get antsy and we'll say we've been spending three weeks, a month, two months, looking for this person, can we just settle for a B player? And there is a cost associated with that, so it's very important to continue to stay the course.

KL (24:58): And now you've got to keep those A players, and Nikola gives us a brief explanation of Radical Candor: keeping it honest and caring, and the challenges that that generates.

NI: So you go through this process and you've hired A players. Now how do you keep them around? Radical Candor has been a solution to this and many other people-in-organization conundrums that I've dealt with over the years.

So the way that this Radical Candor book is set up, and again, I recommend you read the book. But it consists of this set of quadrants. And so the two axes that you have are "caring personally" and "challenging directly." You have to acknowledge that individuals in an organization are people, with challenges and interests and lives outside of work. And that's what influences their job as well. And there's nothing wrong with caring for people, even if you're not a family. In fact, it is a requirement if you want to be radically candid.

Now the "challenge directly" piece goes together with "caring personally" in this set of quadrants. It means providing honest and direct, so unambiguous, feedback. And this is both positive and negative. And you have to also be able to accept feedback yourself, and be grateful in doing so.

So now you're going to land in one of these four quadrants. The best one, and the one that you want to be, is radical candor. This is where you care personally and you challenge directly. So what this really means is you want to be specific in your feedback, and care for the person that you're providing feedback for. And similarly, feel the same way about feedback you're receiving back.

So when it comes to praise, be specific. Similarly, you have to criticize. You have to criticize to get better, and it's often better to criticize when, and this is a bit counterintuitive, but everybody can always do better, and you're a lot more open and in a positive mood to accept criticism, after a win, than you are after a loss. Nobody wants to pile on. But the idea here is that you have to criticize, and you have to criticize things that are actionable and constructive to make things better. And if you care for people and you provide that direct feedback, you will be in the sweet spot of Radical Candor.

KL: Is this something that you train to, for your people, to keep on top of it?

NI: So for better or worse, everybody in our organization has been given both the “Who” book and “Radical Candor” book, and, in fact, I think radical candor concepts are sprinkled throughout our values, and therefore are revisited as part of performance reviews and general conversations. And we do try to model the concept, at least I personally try to model the concept, and I will challenge people when I see them slipping into one of the three quadrants that aren't where we want them to be. And so that's part of being radically candid, right? I will reach out to them and say, “Wait a minute, you had the right intent, and you're trying to do the right thing, but you're not stepping up and you're not challenging other people to accomplish that.” Right.

KL: Did you find you had improved outcomes? And how do you measure that? Is it how long people stayed? Or what your turnover is? Or... I find that difficult to measure. How do you measure it?

NI: It is very difficult to measure, especially one reason that I find it very difficult to measure is that it requires a lot of time. So knowing whether or not you're hiring well is not something you can find out in a year. It takes a long time, because you have to look at that turnover, you have to look at the culture shift, to see if it's going in a positive or negative direction. But I would say, based on the observed conditions of the lab right now, I would say that the hiring process has improved. Because the turnover has reduced, and the job satisfaction from the current employees, even those that have moved on, and their feedback after they move on, has led me to believe that everybody in the lab is a lot more happy, as well as the fact that they're sticking around for longer, and they're more passionate about the work they do.

KL: I was struck by how we have often talked about keeping our focus as PMs on providing value, and the value of projects viewed as investments. Nikola’s hiring technique makes a simple but powerful switch in his expectations. It's not a job description he offers, but a description of outcomes about the value that a new team member is expected to bring. Value as a team. Value as a team member. We lose sight of this in the traditional hiring technique, I think. And hiring is one of the most important functions of an organization. So take the necessary time and effort to get to know the candidate and their complete story. Are they really a good fit for the organization? That is the question.

You can reach out to Nikola at Ivanovn@umd.edu.

Wendy Wickham (30:18): This morning I wanted to share some techniques for observing your stakeholders. I feel that bridging the gap between what people say and what they do is really dependent upon how well we observe our stakeholders.

KL: That's Wendy Wickham. Her presentation is titled “Stakeholder Observation: Minding the Gap between What they Say and What they Do.”

WW: I'm Wendy Wickham. I’m a Project Manager and implementation specialist. I'm currently working for a digital transformation specialist who's been specializing in remote webinar solutions and unified communications. So the anthropology studies I had a chance to do in grad school have colored the way I engage with new organizations and cultures.

KL: Yeah, your whole thing is around ethnography and ethnographic documentation is a sense. And in fact, I've got questions around that as a former Peace Corp volunteer, I kept hearing “Coming of

Age in Samoa" happening, that I was reading when I was out on island. I was like, "Oh wow, she's approaching projects as a cultural strain." And I thought, Oh, that's really fascinating.

And you brought this to us at UMD, around this issue of being able to understand when we're trying to implement something new. And you were challenging people to look at the gap between what stakeholders say they will do what they are going to do. And I saw that it became predictive, that's what I thought was really interesting. Your idea is that you are able to begin to understand what happens, before it happens.

WW: Yeah, you can usually catch patterns, and you can also catch what behaviors are being rewarded in an environment. And I always found this really fascinating. You hear an awful lot about change resistance. One of the things that I've experienced quite a bit in my career is the notion that you can go and have this big project. Hurray! But then there's nothing happening in the background that's going to reinforce that change, or there's nothing happening that really encourages the change to stick. And then you wind up with, yeah, the project may have been successful, but you're not seeing the return on investment because people used the tool for two weeks, or people make the change for two, three weeks, but there's no reinforcement after the original ceremony, and then you just kind of go back to your old ways.

KL: But I was really struck by something you laid right out at the…I mean, it's right out at the opening bell for you here…

[BELL]

WW: So, one of the things that I've learned over the years is that personal behaviors truly are the foundations of a lot of our project risk. It's people who control the access to resources. Until robots come, people are responsible for executing the tasks in our projects. And ultimately it's people that will accept or reject our change.

KL: And I was like, "Wow." Because we are often so trained that when you're doing risk management, you look at internal risk and external risk and resource risk, and they call it those things. And then they talk about external risk, even, political risk, economic risk. Unrest. What's going on around you?

And you're like, "Yeah, no, it's about the key players. And the fact that they don't do what they say they're going do." That's where your risk is.

WW: Yeah, because any of these change initiatives. We are trying to change behavior. To me, there's always people sort of driving a lot of project risk. Something like standing up a new server. You know, somebody needs to configure the server. Somebody needs to turn it on. Someone needs to transition whatever needs to be transitioned. Is there something that needs to happen from the end user, whether that end user's an administrator or not, where they've got to redirect things. Who approves the project? Who's the one who signs off and says, "Yeah, this is working the way I expect it to."

KL: You were suggesting that there were four steps we need to go through to start understanding, "How will those that I'm talking to likely respond?"

WW: So I’ve found that ethnographic observation is a really good way to get a feel for the culture that your project is working within. And ethnographic observation really is observing people and people’s behaviors. We're doing this with an eye towards stakeholder management. So the way I approach this is through four basic steps. And the first one, which we’ll spend a lot of our time on, will be on getting clearer on yourself, and how you're walking into that observation. And the second is defining the question. It helps to go in with intent. And having a specific question that you're trying to ask keeps you somewhat focused. The third is actually observing the environment. And then finally, leveraging these findings. How do you use what you’ve learned to help your project?

WW: So I’m going to go ahead and start with knowing yourself. It's really about surfacing what assumptions you’re going in with, what biases you have, and the motive that you’re using when you're walking into a meeting or even doing your project. What are your motives?

So I’m going to start with assumptions. And the big question here is, what do you expect to find? I’ve found that writing down my expectations up front, gives me a platform to then separate those expectations, and allows me to question some of these assumptions that I’m bringing to the table. As an example, let's say I've been working in an environment for a really long time, and I am trying to implement a new tool, and I’m about to go to meet the helpdesk manager. That helpdesk manager has a history of resisting all the other implementations. If I write down the assumption that he’s going to resist this one too, due to his past behavior, at least I can see it. So the invitation is to see, Hey, are we wrong this time?

The second is surfacing what are your personal biases? What would you prefer to see as you go into this meeting, or you go into this conversation? I know I have something I jokingly call “Wendy’s Utopian Fantasyland.” And my judgment is, boy, if I see something that's organized and under control, and that’s been well planned, it’s awesome. These are the things that I want to see, and these are the things that I categorize as good. Again, it's really good to write down what those biases are, so that you can question them. The big trick with some of this is to be able to suspend a little bit of judgment.

The final one is motive. Why are you making this observation? Are you trying to embed with the team? Are you trying to figure out those norms so you can better build trust? Or are you trying to make a major change and you’re just trying to figure out what you’ve got to work with?

WW (37:49): There’s a spectrum that anthropologists use called the observer/participant spectrum. So on one side of that spectrum is the observer. And there is an advantage to being an observer, in that you have perspective. You're questioning what's going on, and you also typically are going in with the knowledge of alternative outcomes or alternative behaviors, or ways that things could potentially be different. On the other side of the spectrum is the participant. There's an advantage to this side, too. You're building trust with the people within that culture. And also, with that trust, you're able to gain a deeper understanding of what's happening, particularly things like unspoken norms.

There is no right area in that spectrum. There are, however, ways that we can leverage that continuum, and move within it, moving in and out based on our need. And there's ways we can leverage that continuum during different points of our practice. So, like in initiation and planning, you may find yourself a little bit more towards the observer end of the spectrum, as you're trying to get a feel for what’s going on. If you’re at the point where you’re trying to get the team to work optimally, you may wind up being more in the participant end of the spectrum. In that spectrum, you’re not stuck in one place, and there is no optimum. The only ask is that you are aware of what you’re trying to accomplish.

KL (39:30): When you're talking about the observer and the participant there, that's like viewing their role, at least at that part that you're asking a question about, right?

WW: There's a couple of ways that I think about that spectrum. One is, where are you naturally going to fall, based on your situation? If you're a consultant, you're a lot more likely to be observer; if you're embedded, you're a lot more likely to be participant. And so that's part one. Because part two is really where I was trying to invite people to move around a bit, where we have a choice, and part of it's defined by, what is it that you're trying to accomplish?

So for instance, in this new organization that I'm in, I've been doing a lot of observing. And part of it is because I'm trying to become more of a participant. But there's always that option. It's like, Okay, now I can step back. What am I seeing as an observer? How does this track with prior experience? And this is where writing down your assumptions come in and what biases. It’s like, well, what do I want to see?

KL: Do you write those down? I was struck by this whole thing is like, Oh, I don't know that a PM can do this. This is like having an ethnographer with you. You know, if I had Margaret Mead on my shoulder, I'm going to be really happy to be able to do all this, you know?

WW: I think we kind of do this naturally, just maybe not in that way. If I think about it, I'm already taking notes in meetings, I'm already scanning for how team members are interacting, I'm already scanning for how stakeholders are reacting, I'm already doing the stakeholder management work, so a lot of this is embedded in the stakeholder management work. I'm already doing risk management, and often times in risk management, at least the way I do it, I'm looking at people risk. So a lot of it's already embedded in the work. I think it's more of an invitation to look a little differently.

WW (41:37): So now that you have an idea for assumptions, biases and motives, the next key is to define your question.

And Christina Eng has a really great book, “Watching Closely,” where she goes into deep detail of how to do ethnographic observation. She recommends doing one question per observation encounter. And you can use that same question across multiple encounters. So again, when I talk about observation encounters, I'm thinking meetings, I’m thinking one-on-one conversations. An example of this is looking at a question surrounding cultural norms. Another really good example is figuring out a network map. Who’s talking to who, and who’s got influence with who? Here, what I'm trying to figure out is, what behaviors am I seeing most frequently?

So some examples are preferred modes of communication. Is it all instant messenger? Are they instant messaging each other all the time? Phone calls? Are they using emails? Slack? What’s the typical response time? What are the active hours? Are you seeing more activity in the morning with this group of people? Are you seeing more activity in the afternoon? Are people reaching each other 24/7? But the key here is to go in with an intent of just observing the behavior. And you don't really need to figure out why they’re behaving that way.

KL (43:09): If I were in charge of getting my team, my group, whatever, to now working in this remote environment, using a series of tools differently, from how we store and archive, to how we edit and share, and also how we communicate. The whole realm. If I'm approaching that as a PM who's doing that, my goal, as I'm trying to think about it, could be, Okay, this team over here is less likely to really be buying on to this, and that it's worthy for us to think about that ahead of time.

WW: Right. And also to think about where those points of resistance might be, so that's kind of where the gap analysis shows up. So for instance, if I've got a group of designers, they work in person, they love their post-it notes. Where’s going to be one area of resistance? Well, I need to be in a room with these people so we can play together and jam with sticky notes.

Okay, now we've got something that we can glom onto to help with the change, especially if it's like an involuntary change. It's like, Okay, what can I do to help them make this change easier? Is there a tool that I can introduce them to? Is there another group of designers that I've already worked with that I can introduce them to and they can jam on, Okay, here's how we made the transition, or here's how we work on a remote team. That's one of the things that I tend to look out for. And what makes I think observing so powerful is that I'm not just looking for, “Are they going to resist?” But I'm looking for, “Okay, now how can I help them? Where are their points of resistance going to be most likely? And how can we bridge that gap?”

Because that was something else I think I talked about in that presentation, was that whole appreciative inquiry. Where are the seeds already for that change? If you have a lot more to work with, it may not be in one place, but if you have examples and models and people doing the behaviors already that you want to see, it's a lot easier to make the change happen than it is if like, no one's ever done it before. And you've got no models and you're trying to like... And you know, let's even take this shift to remote work. The companies that already had a cadre of remote workers had a much easier time of it.

I know for myself, the company I'm embedded in now, most of us were already remote. And we work with these technologies every day. So that was a heck of a lot easier than another organization I used to work for, where everybody was in person. That's a much bigger shift. And it's even easier if you've got a *few* people doing it, because then they can model and help guide. And it's already realistic, right there, than if you have just an entire organization that's all in one place and no one's ever distributed. Like they are not even doing teleconferences between buildings or between regions. That's a much heavier lift.

KL (46:04): You highlighted to people to be very specific about one thing at a time. One behavior, question you're asking about there. What would have been the question right there, if you were the person rolling that out with that design team?

WW: So if I'm starting to hear resistance. Or if I happen to know that they're... This just happens to be very in-person group, the first thing I'm looking for is how do they normally interact? It's a much broader question. And then you can start drilling down into, Okay, what's their process for interaction? And, when are they using this process? Are they doing it in person like this all the time? Are there variances? So you can start really peeling down the layers.

When I go into a customer, the first thing I'm typically looking for is just really high level, how are people talking to each other? What time frames are they talking to each other? And what time am I getting pinged most often? Is my phone blowing up at night? Are people pinging me on the weekends? For me, it always starts with a fairly broad question of, you know, what's the general flow of how people interact? And then you can start drilling down.

I think even in projects you wind up starting somewhat general. Like here’s a general problem. But then when you get to the nitty-gritty of, “Okay, time to implement,” you wind up doing step by steps, and how-tos, and you know, so getting into the specifics, and here's how you bridge from the old to the new, in a very detailed manner.

WW (47:36): So the next step is actually observing your environment. Figuring out where you’re at. Taking notes on what you see, and not just what you hear. I know that it's very easy just to focus on the content of the conversation, but there's a lot of other physical activities and behaviors that you can observe. And it's not simply, when you’re in a meeting and looking at body language, but it’s even something as simple as, Are people using video or not? How are people calling in? Is everybody muting or not? Is there particular group of people that’s muting, and then others that aren’t? So there’s many other things that you can observe, even if you've taken out the variable of your office space.

The next is to decide on a coding mechanism. In stakeholder management, I've found it often advisable to keep the information in your stakeholder management matrix private. And the same thing applies here, too. So having a coding mechanism is really helpful. I'm talking about things like, Okay, what's the code for this person or this person’s boss? What’s the code for, does there appear to be hostility, or do they appear to be friendly? What is the code for where they’re sitting in around a table? Is there any importance to positioning? The field behind this qualitative ethnographic analysis. And eventually, as you do more of these observations, you’ll start discerning some patterns, and then you can code based on those patterns.

KL (49:25): I was thinking coding has kind of some broad meanings. What were you going with, with coding, and how can we interpret that as a PM?

WW: Okay, there's two ways to sort of measure or analyze. You've got your quantitative and your qualitative. So quantitative is, How many times am I seeing this behavior? And so you're coding, okay, it's this example of this behavior. And then there is qualitative, which is, Okay, who's talking to whom and how frequently, and what's the body language? What's the tone? Is it seeming respectful? Is it seeming disdainful? And so, like with stakeholder management, you don't necessarily want to share your stakeholder matrix with a lot of people.

KL: Exactly.

WW: And when you're taking notes, particularly if you're doing meeting notes and taking notes, and someone's right there with you, watching you type or do whatever, I found it really handy just to have a symbology. And it also helps that my hand writing is absolutely atrocious. But if it's something that I think is going to be really sensitive, there's that definition of coding as well. So there was kind of two things going on there.

WW (50:40): Now, one of the things with this approach is that I don't see it as replacing or adding. It’s really more about embedding a slightly different perspective into the things that we already do as project managers. What is easier to do before the observation steps, is figure out what behaviors need to happen. Now, here's the observation. What am I actually seeing in the environment? And then I can identify the gap, and then figure out, Okay, now what steps do I need to take to bridge it?

I find the stakeholder matrix being a really powerful tool for that. So you can add columns based on what you're observing, or if you're trying to get a network gridded, a column of, Okay, who has his ear, and who is he ignoring, and what are their positions? And you can also, if you identify any typical behaviors, you can have a behavior column.

So, you can leverage that. And then particularly as you start looking at patterns, and discerning patterns, you can then, for those of us who really love Excel, you can then start sorting and sifting based off of how you coded things.

WW (52:07): So the final step is leveraging your findings. And as part of this, there's really two items. One is finding the patterns that you have discovered as you've done your observation. And the other is determining the size of the gap, and what your destination point is, making sure that's well defined, so you can see how big that change is. And then from there, you can determine what's around already that can serve as seeds for that change. You can discern any trends that will impact your project, and impact the success of your change.

And you can also start evaluating whether or not the reward structures that are in place will help or hurt the change that your project is trying to make. And the best way that I've found to have this conversation is to approach it by what behaviors do you want to see in the environment, and what are you rewarding? And surfacing whether or not there's a conflict in that. Part of it is just analyzing what needs to happen. Do rewards and punishment and reinforcement need to change?

So for instance, if you're trying to put together a more remote workplace, are people being rewarded for showing up and being at their desk? That's going to be the Attendance Award, for instance. If the management is going to change that into something else, that's great. Again, matching the reinforcement with what it is that you're trying to do.

KL (53:57): In an organization that has a PMO or some sort of connecting body that connects projects that are across divisions, that are not just within one group, that it would almost be more advantageous to us if a PMO documented it for the major groups within the organization. Like, "Here is what we know about how we work." What would be the role of institutionalizing this or making it part of an infrastructure – an HR infrastructure? "This how we are." Should we be documenting our culture?

WW: I think a lot of HR groups already are, to a certain level. I think the PMO would be well-served, particularly if they're seeing major cultural gaps – where it's a new PMO in an organization that doesn't really have project management discipline, or resists project management discipline – I think that would be a very fascinating conversation to have.

Because I think that could also help shape, you know, how can we make it so that we can get things done? Because to me, project management's about, Okay, we've got this thing that we want to do, how do we make it real? And it's the project management discipline that's really good at making things real. So within the culture that we're in, what's the best way for us to make real?

KL: What if you had a list of all your projects? You know, it's a portfolio of projects we have to get done. And your PMO is trying to help in your portfolio controls. “Okay, we've got these 19 projects going on and they affect all these people.” And in that, we always look at where the dependencies and interdependencies are, when they're going to be done, milestones, phase gates, this one will be done then, then this one, when we should be looking at when do we start getting our return in value? All these conversations we have as PMs of PMs. PMO-level kind of thinking. And I thought, you opened with, “People are the source of risk. It's their behavior and it's related to what you expect and what you get.”

So then I thought, Oh, this would be fascinating. They've tweaked the portfolio, we know how we're rolling out all these projects. Then your ethnographer rolls in and says, “Okay, but here's the fingerprint of our organization. And that team there has got huge gaps related to this. So I'm here to tell you that that one's not going to happen in seven weeks, based on all those gates; that one's going to be 17 weeks.” Or, “You'll get it in seven, but by the way, you won't have your value transformation at the end. That's going to be like off this chart. That’ll be in Year Three of your strategic plan. That's not happening this year.”

In other words, viewing it as interpreted through risk, on the successful delivery – completion of the project – or delivery of value. And then wouldn't that be fascinating to be adding that back in to say, “If we had more teams more aligned to the culture, or the culture aligned to these types of teams as we're observing, that gap represents a risk in the delivery of the system.” Because that would shift your portfolio.

WW: And I think it'd be interesting, just if you're looking at decisions on projects, and you're trying to move the organization forward in a particular direction, asking about, Okay, how does this project naturally fit into the culture? Does it naturally fit into the culture? Because I don't think we ask that enough. So I've been on a couple of projects where you're essentially asking wild cultural change.

I'll take the example of way back, early in my career, I did electronic medical records implementations during the area where doctors were changing from paper records to this new electronic medical record. And one of the cultural things that kept getting butted up against was, doctors were not used to sharing files. And an electronic medical record opens everything up to sharing.

You know, thinking back on that, it's like, Well, if I knew that it was going to be that much of a disconnect, at like a portfolio level, I could ask, Okay, what can I do that's smaller, that might help make it easier for then this multi-million dollar project to be successful? Is there something we can do just in a process with our current stuff to encourage that level of sharing?

So, part of that to me is also that ask of, How does my project already fit into this culture? Because I think the projects are going to be a be a lot more successful if you get a chance to plan on it. I think that would be a very interesting way of thinking about even portfolio management.

KL (58:38): So remember, this approach should be embedded as a supplement to your PM tasks. You can learn more about Wendy and the work she does, and her blogs, at middlecurve.com.

After listening to these two presentations, it should be pretty clear to you how important culture is. So put on your ethnographer hat when you're hiring new team members. Keep it on while interacting with colleagues and stakeholders, explore expedient routes to bridge the gaps between “as is” and the “new” you are trying to create. And remember to check out the University of Maryland's website to see these and other presentations in their entirety, along with the PowerPoint slides.

Special thanks to my guests, Nikola Ivanov and Wendy Wickham.

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