

82. View from the C Suite - Part 2

**Jeffrey Goldman, Tom Klaff, Ken Loy, Jeff Mascott,
Erin Pitera, Jeff Powell, Pat Sheridan, Trevor Wilby, Steve Williams**

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Erin Pitera: We have worked with PMs where it is all about process over outcomes – timelines, budget, cost – really focusing on the process over the outcome. And both are important.

Ken Loy: The ones where they're limited, are only fixated on their historical knowledge.

Steve Williams: Think two orders beyond just your role to improve how you plug into the process.

Jeff Mascott: The one thing that I would have PMs learn is to be able to easily manage when changes happen.

Trevor Wilby: We're in the middle of the fourth industrial revolution. It's happening, not on a yearly basis, it's happening on a monthly basis. So if you're working on a five-year project, you need to be aware and cognizant of the changes that are occurring in your technical domain to ensure that you're keeping up, so to speak, with the change in the world around us to ensure the project keeps up as well.

Kendall Lott (01:28): Hello PMs and welcome to our second episode from the C suite. Once again, I speak with executives representing a variety of organizations: aviation, HR, software, kitchen appliances and more. This time we focus on where projects go wrong and which project management skills are absolutely key. I also ask the executives what capabilities and knowledge areas project managers who are interested in moving up the ladder should focus on. (Who would know better than the Executives who've made it?)

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

KL: As you are well aware, a project manager's responsibilities are multi-faceted with infinite moving parts. (Well, maybe not infinite, but lots of moving parts that require constant surveillance and adjustment.) As agents of change – and never forget, you are agents of change – the ones who produce, the ones who actually make things happen, PMs begin each project in the hypothetical in a kind of fog, moving towards clarity and realization. There's a lot you could guess that an exec thinks you could be doing: flexibility, maintaining the big picture, turning those dollars. And you won't be surprised to hear that communication – genuine effective communication, and I don't mean the PMBOK® comms planning stuff, but effective communication with your team – is highly rated.

But in this episode, we hear more, so much more, and I found it eye-opening. So join me in the journey of understanding what leadership says they want. Grab a pen, download the transcript and let's head on through the milestones.

KL (03:11): Milestone One: To Everything, There is a Season. The potential problems of the PM style.

So what do we need our project managers to be able to do here?

Pat Sheridan: Smart people, diligent teams, come up with best practices that work for them or, more broadly, for the industry. Okay, those become codified. At some point that becomes the PMP, the Agile Manifesto, the whatever...the Lean Startup, methodology, design thinking. From there, it becomes a class of templates to drive a manual-driven process. From there, and the era we're coming into now, in my opinion, with projects, is that it becomes subscription software to enable distributed collaboration across larger teams.

My name is Pat Sheridan, and I am co-founder and Managing Partner, of Modus Create. Modus Create has four practices: strategy, Agile, Cloud, and we recently launched a security practice.

PS (04:14): It isn't all black magic. It isn't some kind of witch craft. There is no orthodoxy. What there is, is understanding the needs of your organization and the strengths of your organization. Play to those strengths. If you've worked on large-scale government projects in a certain industry or for a certain agency, then, man, you really have a strong bead on what's needed there.

And then you dig from these tools. It's like you don't have to read the book from start to finish, you pull the chapters out that make sense for this need. So the work then becomes, where do I need to learn? Because this is where my organization needs to go.

KL: And it sounds like what I'm hearing from you is the discipline and the processes matter, and then from those you select. And alignment, it has to be what your organization is. So forget the orthodoxy, take one thing from Agile, or one type of practice you had, for the place that you're working,

Erin Pitera (05:11): I'm Erin Pitera. I'm the CEO of FMP consulting, and we're a management consulting firm, but we really specialize in strategic human capital management, and in particular, I'd say the intersection of people, processes and systems to make organizations operate more effectively.

KL: When is someone executing project management and you're like, Oh man, project managers...

EP: Yeah, I think when it's process over outcomes, and again, it's *over*. Process is important, but when it's process *over* outcomes or at the expense of outcomes, even sometimes. But we have worked with PMs where it is all about just timelines, budget, cost, really focusing on the process over the outcome. And both are important. PMs aren't as effective, I think, when it's over-engineered, when the project can be over-engineered. And sometimes there's so many tools in a project manager's tool kits, but not every tool needs to apply to every project. And so I think those that really can understand the best ones that fit for the best types of projects, can kind of flex that

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way and don't over-engineer – because I do think that's when it gets to, you feel like you're just adding cost to the project versus really getting something done.

KL: I heard this... Actually, this is a main theme in a recent symposium, is that now there are so many methods and pieces that the really powerful project managers and program managers are those that know when to select which parts, keeping their eye on the prize. And that that's actually pretty cool. It's that you cannot have orthodoxy, but the orthodoxy mattered, because it gave us the discipline, was kind of the theme in my mind.

EP: They have all that knowledge to be able to really select from that tool kit effectively. That is really impressive. We don't always see that.

Jeff Mascott (07:14): My name is Jeff Mascot, and I'm the CEO of a strategic communications firm called Adfero, based in Washington, DC.

I have definitely experienced that certain PMs who have from working in large-scale environments, where the projects are pretty massive, say, developing a software product where there's 12 people involved over the course of two years, they have a much harder time coming to a communications agency environment where a lot of PM-ing is not so much working on projects that are going to last for six months or 12 months. These are projects that have a short shelf life, and there's often a lot of, depending on circumstances, changes or adaptations that need to be made along the way.

Ken Loy (08:14.): So if they come up to a problem. And if they say, Ken, I can't do that because I don't have this information. Well, did you try doing this with this other information? Were you able to ask for this, were you able to go around it and try another way? Were you able to call up that engineer and get the information from him, informally, without having the published document, so you keep on moving? And they would – the ones that are – that are not creative, are the ones that said, but Ken, the project, the integrated master schedule, see here on line 321, it says that I have to have these predecessors, and if I don't have those predecessors, I can't move, and I'm just going to sit here. That's not creative. That's not helpful.

My name is Ken Loy. I'm the CEO Hensoldt Inc, a US subsidiary of a German parent company, and we provide defense sensors and electronics to the US defense industry and to other government agencies.

KL (09:31): As a class, on their good day even, where do you find the PM manner limiting?

Ken Loy: The ones where they're limited, they are only fixated on their historical knowledge. That could be their professional background, it could be the program that they previously worked on, it could be the previous contract or the previous version of the aircraft. But the ones who say, “Hey, we can't do it, because I remember back in 2014, we tried that and the government wouldn't allow us to do that,” those are cases in which people find themselves limiting and they find themselves frustrated, quite frankly.

What I compare it to is, you know, looking at a stereo, an old-fashioned stereo receiver, where you've got a bunch of different knobs, and you have the treble, you have the bass, and you had all of those things. How can you keep adjusting those knobs until you optimize the sound? It's the ones that are really creative, or ones who recognize that, “Hey, I am not limited by just one knob; I can

keep tweaking a bunch of these things. And what if I turn this other one up? How will that change the problem?”

Jeffrey Goldman (11:04): My name is Jeffrey Goldman, and I am the CEO of GoldSentinel. We analyze data from online sources and provide services to help our clients make better decisions.

KL: Jeff takes us into Milestone Two: Remembrance of Things Past. Painful things. When projects go off the rails.

Have you ever had a project go really bad?

JG: Well, if you have a project, at some point it goes really bad, right? It's kind of like the same with data. If you have data, you have bad data. So, when you're in it, it's a horrible, horrible place. When you're out of it, you realize just how much you learned in such a short period of time. A failed broken project that you're trying to repair is no better training ground for the budding Project Manager.

My first venture into project management was being thrown in the middle, in charge of a project that was broken and needed help. It was a project that was fairly large. At its peak, it was like in the 30-40 million range. And it was actually very, very small compared to the overall broader defense project, that this was just one piece. So what ended up happening is, our piece was on the critical path. So that customer was all over us about risk management, and saying, “Look...” And schedule – so the schedule management as well. So every day I would have those stakeholders come in and drive the stakes into me to say, “You are going to be on the schedule, because if you fail this schedule, all these 22 other programs that were dependent on us would slip their schedule.”

And so at the same time, the risk people were beating on our door saying, “You can't do this,” or “You can't do that, because that puts this risk level too high.” And so you would have to manage those expectations.

KL: Where would you put your finger as, What was the area that went wrong, that is the root cause of all the things that made that a difficult project?

JG: So I would say it was in the communications management area. And the reason for that is because when I went into the project management for the first time, I had an expectation that was a bad one. And that expectation was, when I gave an instruction for someone to do something, they would do it. That was my mistake.

It is a fallacy to think that taking a group of individuals, who have never gone through any type of capability, maturity level process of any kind, and were just focused on a service, a true service type of mindset where a customer comes to you and says, “Do something,” and then you just do it, and that's it, and then you do the next thing, and then you do to the next thing, and you don't necessarily have a plan for where you're going or how you're going to manage any of this, how you are going to maintain any of this, or how you're going to handle resources or cost or schedule, any of that, you're just doing these things. And so going into an environment like that and having an expectation that you ask for something to happen that isn't like a direct, “I'm going finish this and hand it to the customer,” they don't understand and they don't maybe deem it as important as you do as the project manager.

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So that communication's role, it's not sufficient, to just bark an order and then assume it's going to get done. So you need to have a buy-in and an understanding and a training, so that they understand the overall scope, the overall schedule and cost, and all these things that they hadn't ever considered – ever – that are part of the project management knowledge areas that you are running.

And you now need them to be a part of that. They don't have to do all of it, but they have to be involved in the parts and understanding of why they're doing something. So you have a software team doing this, you have a testing team doing that, you have a quality control team, you have a mathematical modeling team, all these different groups. The communication has to flow. It can't just go up and down – that group to the project manager, and then back down. It has to go across. So communications management was probably our biggest failed area for that project.

KL (16:17): Now that strikes me that that is the mechanism, but that's writing over a deeper area of knowing your staff and staff management: understanding the capabilities and what's needed of them as professionals and individuals. Which strikes me as writing over yet a deeper thing, which is, there's an element in project management, including being on a project team, that says critical thinking is important. Because it can't be so clearly defined probably. In fact, I think that's one of the problems in project management, I don't know if you do, which is, we seem to have this belief that if we break it down enough and make it clear and talk to someone who's in that role, now it's a matter of doing that and tracking that it's done. But I don't know that we can ever be that clear, is kind of what I'm hearing from you. I mean, you said that you asked them to do something, and that may be exactly what you got. And that's not quite what was needed.

Steve Williams (17:14): Steve Williams, CEO of a defense company that I was able to grow in four years to become a top 100 global defense company.

KL: Do you have any reminiscences of projects that went bad?

SW: These would be deliverables, we had to one of the big US defense companies, where they then assemble a major subsection of an aircraft and deliver to yet another big company, like a Boeing or Lockheed. So their reputation's on the line too. So the worst thing that we could do as a supplier is do something that costs our customer time, money or reputation.

And a couple of times we had quality escapes. They got all the way through to the customer and they didn't notice, but *their* customer did.

KL: Uh oh. Your customer's customer.

SW: So, it just rolls downhill. Where it became a huge problem is where the program manager didn't have a good relationship, and you didn't have that communication channel. So it's easy to... If you're in the position of, "Hey, I just got beat up by Boeing, I'm going to go beat up on my supplier."

KL: Yeah.

SW: But if there's a relationship there, the first thing that...and this is what happened... It was on the critical path for an aircraft. Critical path means if we screw up, it leads to a day-for-day delay, aircraft deliverable to a country or to the US Air Force or something like that.

The first thing they did is, instead of internally call their boss and go, “Hey, we screwed up. Our supplier screwed up,” or ... They pick up the phone and call the program manager, “Hey, I just discovered this thing, Hey, we should have saw it, too. I need your help.” And they work together.

Where there wasn't that kind of relationship, in another example I can think of, the first person they called was their legal.

KL: Oh, that’s good example.

SW: So how do I find out about it? Their legal is calling my legal, saying, “Pursuant to this subparagraph of your contract...” It’s like a cure notice. So that’s the first thing they're going to do? Wow.

And there's always going to be things that go wrong, or late deliveries, the postal service does something, you didn’t put enough time in the schedule, a part was not to the right specification. If you have a good program manager, they're proactive, they're on top of it, and they can... “Hey, don't get excited, Boss, but this happened. But this is what I've already done about it, and I've already talked to the following people, and I kind of leaned in tough on our supply chain management quality guys because they should have picked up on this.”

KL: The issue of relationships with your customers, obviously with your stakeholders, generally, with your boss and your team, but thinking along the customer – and in customer, extend it through the supply chain, if you're a sub to a sub to a sub or whatever – that helps you with sales. With getting new requirements. And we want project managers to rise to that. So the relationship enables you to be in the place to hear that in a way that's non-... probably non-salesy, non-...is appropriate-sounding, and probably more honest and understanding.

And then also that relationship allows you, when things go wrong, thinking along the quality knowledge area, quality is always difficult, and when quality goes wrong or you had other problems in scope and schedule, the relationship is what allows you to have the grace to fix things, to have the opportunity, the space to fix things, as opposed to it being escalated to a boss and over to the law and over... That's always a fun one, right? Or I'm told – it doesn't happen in my world, but I'm told particularly in your world – it’s always good when you find out in the newspaper. That's always another fun one, right? Is that true? Oh, team you’ve got to see him smiling here. Yes, he knows about this. So we want the grace to not have that. So relationships matter as an actual business function around how we recover from difficulty, and how we expand work.

KL (21:32): Milestone Three: What is to be done? Finding the key things we need to develop on teams.

What would you say are some key ways of thinking, or tactics, even, whatever advice you would give on how to build trust when you're in an environment similar to what you've been in? Complex environments, building complex things, multiple stakeholders, lots of customers, technical projects, things when they go bad, people die. It's dangerous. So in your environment, what does it mean to build trust or how can a person build trust?

SW: Well, I'd say in any business, in any relationship, it's something that takes a long time to build,

and it can be eroded very quickly. And then the recovery takes longer than it did to build that trust to begin with. So I think a lot of it is treating everyone on the team with the same level of respect; empowering them and showing that; being consistent; being a good communicator; that they know that they can bring problems, not just the good news, but just a very open dialogue. And when something does go wrong, they know they can call, pick up the phone, whatever, at any time, without fear of retribution.

If it's the issue of lack of competence... Okay, then, is that the company's issue? Were the right level of certification and resources...course work and things like that, before putting that individual in that position...?

Trevor Wilby (23:22): My name is Trevor Wilby. I run – or own – T-Rex. We're a federal IT contractor; we do large scale modernization projects for the federal government.

KL: So in your context, what have you observed as the key discipline areas that, you know, get it all right, but you *must* get this right more than anything. If you had to list a couple of those things, what would they be?

TW: So requirements management, I think is number one. You have to listen to what your customer wants, you have to help them get to their pain points, help evolve them to their pain points, so they can communicate what it is that they want. Because that's setting your expectation for the entire project. If you don't do that, you're not going to end up in the right place, because you're going to have a disconnect between what your customer wants and what you deliver. So fundamental, number one, you have to do a requirements analysis, requirements management.

Second is cost schedule management, and in our world too, we also have a technical base line management. So those three all work in concert: your schedule, cost, and technical baseline management. You can't get to the end result of what your solution is and say, "Here it is, but I'm late, it cost twice as much. And I probably put 12 things in there, you don't want." I love people who get the results, but you also have to do it the right way. And usually when you do a root cause analysis for, you know, you have a disconnect at the end on one of those things... you do a root cause analysis, it comes back to the requirements, right? And you got the requirements wrong, and you didn't help maintain and manage those requirements through the process.

The next piece is change management, because invariably on any project, and I don't care if it's a two-month project or a five-year project, change will happen. The customer will change; you're going to run into a wall and say, "We have to go back to the customer and try something different, so we need to ask them for a change." And change will impact cost, schedule and technical baseline. So that to me, is imperative to be able to manage that change

KL: And what does that mean to manage that change? Does that mean anticipate it? Know how to keep a team at bay? Know how to make changes to your own scheduling in your process? Or is it time to violate the process when you see change coming?

TW: It's all of the above, but you need a methodology by which change is able to occur in your project. You need to follow traditional change management, meaning let's just say, you have a change management process, alright? So hey, are requirements changing? The customers changed their mind, so we need to analyze our cost and schedule and technical baselines, figure out how that

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change is going to impact all that, and then go back to them and say, “Here's what the impact is. Same price maybe, but it'll cost us an extra week and we've got to jigger, our resources around a little bit to manage that.”

And you might also... One of the last pieces is risk management – risk and opportunity management. So you might go back to them and say, “There's no change, but there is risk that you've added into the program or the project by making this change.” So you need a rigorous process that allows you to manage the change as it happens.

Now, should you have a vision for your project and therefore vision for where tactical change and even strategic change has to occur inside your program? Absolutely. If you're working on a five-year project, we're in the middle of the fourth industrial revolution. It is happening, not on a yearly basis, it's happening on a monthly basis. So you need to be aware and cognizant of the changes that are occurring in your technical domain to ensure that you're keeping up, so to speak, with the change in the world around us to ensure the project keeps up as well.

The last piece, I think, is risk and opportunity management. You know, you've got to really fundamentally understand what the risks – internal and external – are to the delivery of your project. And you need to track those, you need to mitigate them. Mitigate that means you're going to... There's a price tag on it, on how you mitigate it.

On the flip side is opportunity, and we talked a minute ago about vision for where we're going to go as a team, or as a project. You also need that tactical and even strategic sort of vision for changes that need to occur in the system. Well, guess what? A component of that is opportunity recognition. So if you're going to manage risk, then you need to be also looking out for opportunities to save the customer money, deliver better solutions, earlier, or deliver earlier than the schedule requires, so that your customer can benefit from your excellent project management.

KL (28:37): If you saw a really good PM that has what you're anticipating – and you put a lot of it into the PM already. Should they say, “I'm going to move past project management. I'm going to do something else different within this organization.” What's the next logical step or what's the next logical competency that you would see from any...

TW: So it's important that as project managers take on more responsibility, starting out with five-person teams, and evolving to 10 person, 20...30... that they evolve their way through into more and more complex tasks or projects. But don't start off with the most complex project. So that's usually a next step for a project manager in their career is, they're going to go from, “Hey, kick off the new project, here you go, have fun, let's see if you can do the work,” to, “Great job. Now, I want to put you on a problem, and when you're done with that problem, you might evolve your way to a larger project, which is getting kicked off of just upon award. And so you'll go between those two things.

My number one objective, almost in every role that I had in my career so far, has been to build people up around me, beneath me to replace me, so that I can move up and out. And that requires you to trust them, that requires you to coach them, teach them, mentor them, and grow them into that position. And I might not always have a vision for where that next step is. Usually a door opens because you've done such a good job of grooming your team and raising their game up.

TW (30:19): A leader has to have followers, and if you don't have that charisma, that interpersonal capability to develop relationships with people on a one-on-one basis or on a team basis, they're not going to follow you. So you've got to have that magnetism that attracts people to you. It doesn't mean, Oh, I'm a super model. It means that I have those soft skills to interrelate with people.

The second piece of that is trust. You have to engender the trust of the people who you're leading. And if you do not create that trusting relationship, then you're going to end up... Your team isn't going to be as effective, your organization is not going to be as effective as it can be. And that's a component of charisma as well. Trust comes from you as a leader being vulnerable, meaning you share your weakness, you share the things you're trying to improve on and you make yourself trusting by trusting them first, right? So they'll trust you if you trust them, and leaders have to go first in that. They have to be consistent with your culture, and your culture should value respect and trust, integrity, excellence, working hard, all those different things. And so when you find people who engender, who live up to your culture, or promote it and build on it, and they bring that leadership quality, then you probably have someone who's a good fit to step up into that leadership role.

KL:32:02: Milestone Four: Talking about my business generation – Where value gets real: Growing revenues.

Jeff Powell: Once they've got all that other stuff down, they know their technical project they can manage the people, they can manage the customer. Now we've mentored them and they've learn the financial management part of it, well, the next step is, how do you grow in your company? And the way to grow in our business is by growing the amount of business, the amount of work that you have. And the way you grow the amount of work that you have is starting to open up your eyes to all kinds of other things that are going on within your customer space: there's another contractor developing the system over here, or this work going on over there, and this isn't going well, so maybe I should go talk to them and try to tell them about how great we can do it for you. So that kind of business development, that skillset of trying to grow your business and understand what it takes in our space to be able to actually get new business, get a new task in a new contract. That's how you move ahead in our business. And those are the people that end up becoming directors or vice presidents, that have multiple projects under them. And it's usually self-fulfilling. These folks will go out and get that work and once they get the work, we just put it under them and now they're managing multiple projects. So that's kind of how they get ahead.

My name is Jeff Powell, and I'm the CEO of Strongbridge. We do software development and IT services for the federal government.

KL: What do you see is the biggest...not so much the gap, but the biggest obstacle between rising as a project manager and growing in the way you've just described and becoming an executive? Obviously, it's a very different role. What is the gap that makes that a hard leap for PMs?

JP: It's kind of like a funnel situation, where at the wide part of the funnel, you have all these people who are good technical people, and then the funnel starts to go up and the people that show leadership skills and show the ability to be able to multi-task and handle different things, they become maybe task managers, maybe they've got three or four people on a task that they're pulling together. And those folks that show the capability to be able to manage multiple tasks and be able to keep all that straight and be able to... Again, going back to the personality and personal skills, to be

able to manage customers, they bubble up to become maybe a project manager. And the same thing's happening, so now you're halfway up the funnel.

There's still that higher level of the funnel, which becomes your VP level type people, your executive type people, and it's really a different skill set as you start moving up the chain that way. Because now you're... every time you move up, you're getting more business-oriented as opposed to technically-oriented, and the writing skills of being able to write reports and proposals to potential customers, the marketing skills, being able to walk into a customer's office and talk to them about the kind of things that we could do for them and understanding their problems and coming up with solutions for their problems, the ability to manage multiple projects at the same time and not micro-manage, not get involved at such a detailed level that you're only doing one thing at a time. All those are skills that can be learned. Some of them are innate, that people have inside of them, and you can see that as they're moving up the chain.

So it's kind of a combination of training and understanding and mentoring people that get all that along with the innate skills that they already have. They move up to the top level of that funnel.

KL (35:42): What was your experience in getting people to see beyond their... sensing the new... I call it sensing...sensing the new requirements? Did you find that difficult for this project-centric world?

Steve Williams: I wouldn't say difficult. It was a challenge that I had with people throughout the organization.

KL: That's Steve Williams, again.

SW: Trying to get them to think, two levels above where they're actually delivering. So you're delivering to a customer who is just taking taking it apart and putting it into another widget. What then happens? What does that person then do? What does that section of the aircraft... Where does it then go? Think two orders beyond just your role, to improve how you plug into the process. And those are the kind of things you'd want to do if you want to become a project manager, to a program manager, to all the different levels of program managers to a COO, to... In big companies, CEOs, OK, maybe they were the CFO before, maybe they had sales. But in technical companies, a lot of times, they were like the super Program Manager, You know, Bob's not ready for this. Joan is, because she's run a big program before. You have to know how to run a program if you're going to run this company. So Joan is the new CEO.

KL: There's some light at the end of the tunnel for project managers, if they do want to go that way. That role of integrating customer service and understanding the finances around the ability to get other people to do work and deliver it when people expect it to be done, is kind of the magic, certainly in a technical company or...something that has to build something.

SW: You need to know how to sell, not just produce. Working with business development, when you do an upsell, is not just you talking to the customer; you're always keeping the sales guys in that loop.

KL: Well, it's actually working with them, so it's an integration question. So we're past what we said earlier about your own sensing and getting better with your client to understand the next set of

requirements, but literally working with the organization that is assigned to do that work.

SW: And you're proving you can work at the level immediately above you, and think and see two levels above you. What about the company's future? Think a few years beyond your program.

Erin Pitera (38:17): Within our organization, where we do have someone really good, is working well, I think the next step is: there's so much data that's gathered in the project management process in these projects...

KL: Erin Pitera, FMB.

EP: And I think those that will just go to the next level, it'll be figuring out how to visually represent that data so that it becomes a better leading indicator for when there's going to be real problems on projects. And again, I think PMs are doing that throughout, and your risk management and that intersection of data to be able to give your leading indicators on risk.

Because I think it's all about some of the risk management. Your stakeholder management is about the risk to the client not being happy at the end of the day. So where I'd like to see us go is get better at really getting that data visualization, those dashboards, those things that can signal to the clients, you have all that process underneath, but here's what the client really wants to see, right? And it is much more of that leading indicators on things, and being ahead of that and being able to show that to your client in a much more digestible way...

KL (39:39): Milestone Five: To reach the unreachable star – PMs attaining glory. The next steps.

What are the next set of competencies or single best competency that you would like the project manager to be able to do to improve their ability to execute?

Jeffrey Goldman: The best of those are the ones that can not only run that project and run that world well, so that it's not a worry for the C-Suite, meaning you don't have an unexpected budget hit or personnel hit.

KL: That's Jeff Goldman again.

JG: So, being able to have that as stable and repeatable as possible, skills that help you keep the machine moving in the right direction is, I think, key. And then the second is, can you jump out of your world to then explain and show your view on how your project world enhances what the CEO's mission is – either whether it's growth or expansion, or how your piece fits into another part of the company, or can help, or cross-pollinate or... any of those kinds of things that are big picture items. So get out of your comfort zone of the project world that you know and love and just want the next project world, and see how far you can train yourself to stretch to help bridge that gap when you talk to your C-suite.

KL: To be able to be able to bridge the gap, to take the next step, assuming you are an effective executing Project Manager now...

JG: Imagine if your assignment was, suddenly you learned you're going to be transferred out of your project and you can take your ... five people with you to go onto the next thing, how would

you utilize them? How would you put them in a strategic role to grow this new entity that you're being thrown into? And pluck yourself out of your environment, you're in a brand new environment, what are the top three things you would do to make that new environment as successful as your current...? And that that might be an exercise in the stepping out of the day-to-day to think more strategic.

KL: That's super specific and helpful. Imagine how you'll be successful, you want them to learn, being successful, but they know that. Your point is, is take on the tactic of thinking, What would that take? Because if you can start answering that question, you're thinking in the right way.

KL (42:55): From Jeff Mascott, Adfero, on listening to the exec.

Jeff Mascott: I think the very best PMs are people who not only know how to work in Gantt charts, and know how to break a project down into details, and know how to track how things are going and follow up and create new things. I think the best PMs are also incredibly skilled at knowing how to work with people and knowing how to influence and motivate the people who are on their teams. Because often on our teams, the PMs are not working as like the supervisor or the one with authority. They have to sort of... They have to work without that direct authority. So I feel like the skills are really skills on how to motivate and influence people to get things done when they don't necessarily have the authority to do so.

KL: Is there anything about how they need to listen or how they need to talk, when engaging with you or others that are at the executive layer?

JM: I'm looking for people who are really good at sort of listening to me and understanding me and others on the executive team, to really know, when we say X, Y, and Z, we probably mean X, Y and Z, but also like ABC as well. Even though we didn't say ABC as well. So the more somebody is listening, and really listening for not only what I'm saying, but what I'm not saying, and often that comes through time, that is really invaluable to me.

I think what I'm looking for in a PM in those kind of situations is for somebody who can sort of challenge me and say, "We can't do things the way we're going to do it and still expect a successful outcome. Here's how I think we should approach things." And sometimes, if I'm an executive, I might be seen as a little scary or intimidating, just because of my position, and so PMs have to have the courage to step up and let me know when things are not working, and have conversations about how we can improve it.

KL (45:10): So, if you had in your organization, for example, PMs who are knocking it out of the park, really doing well, have maximized, really have it down... fully understand their role, how to execute their role and engage with you properly, and are solving problems in a creative manner...and it's time, and they want to take the next step in their professional career, what is the next logical area typically you would see them moving into? And what is that competency they would need to be learning by having made that move?

KL: Ken Loy, Hensoldt.

Ken Loy: The skill sets for a project manager are the same skill sets you need as a program manager, which are the same skills that you need as a program director, but just that they get

ratcheted up in their consequences...

KL: Oh, the consequences, I like that. The consequences get bigger.

Ken Loy: Right, and your sphere of influence increases as well. And that's important. And the more awareness you have to have of all these other disciplines, because you interact with them so much more.

Pat Sheridan (46:17): So to me, the most foundational thing is this: when you're looking at a system, you have to... that current state, future state... You have to be able to describe the current state.

KL: Pat Sheridan, Modus.

PS: And most projects fail because of lack of shared understanding. And so by running a simple whiteboard exercise with people that are intimidated, non-technical business users, even executives that are nervous that they say the wrong thing, and you can model through them: "We have a thing called a user. That user creates a... application, whatever it is." You map out all the nouns that make up the system. We have an item. We have a shopping cart. We have a receipt, right? All the nouns. Business entity. And then all the user stories, all the verbs are what nouns, what actors can do across the nouns. Like, "I can create a user, I can delete a shopping cart." And this very fundamental way of exploring a problem domain, and defining a shared understanding of a concept of operations of a system sets up a phenomenal foundation for all this complexity.

KL (47:27): Where would you see, as you're working in your own company, the role of the project management discipline? Does it expand as it gets more focused? Does it get iterative?

Tom Klaff: It's going to get more complicated. Business is... and I think that project management has got to lasso it in, because... We're just one SKU. If we grow to hundreds of SKUs, and then in different categories and different markets, internationally, even in different verticals like commercial versus consumer, it becomes... it's gymnastics, you know?

My name is Tom Klaff and my company, Revolution Cooking, designs, engineers, markets and sells innovative cooking appliances to the consumer market.

KL (48:26): Do you have any words of wisdom for people who have been training in the PM space? They think in terms of the connection, the integration, they've got all those backgrounds in risk and quality and scope and schedule, helping to drive accountability, how they need to talk to or listen to executives? Coming from where you are, you know, the Chief Technology Officer, Chief Product Officer, Chief Operating Officer...

TK: I think the common language for executives is really boiled down to the P and L and timing. Time. I think it's the concept of When and How much. And the more literate the project manager is in terms of driving more margin in products, or in projects, and understanding the consequences of slippage, not hitting a deadline or milestone... Executives ... That's all I care about is, "Are we on track? And how much is it costing and how much money can we make?" Translating into dollars and cents and minutes and hours and days is really, really important.

KL (49:38): For project managers in the project management role, if you could, of all the things that you've talked about, they need to learn and know and things you assume, and you said they'd have training... if you can point your finger at them and say, "Learn this," what would be the thing you would say?

Steve Wilson: Just communication. It's not their strong suit. They gravitate to the higher technology production side because they tend, if I'm over-generalizing, not to be the best of communicators. When I walk the floor, think what I need to know. And if you're not sure, just rehearse in your head. What if the CFO came in? How could I have an intelligent conversation with him? How would they look at it? And you start thinking more broadly, when you mentally go through those exercises.

Jeff Mascott: I'd say humility. Because it's not what you... You don't have all the answers. And I think that how you collaborate with others to get to the answers is the most important. Getting your ego away from the work is really, really important. Once your ego is making those decisions, you will polarize people, and you may not come up with the right answer. I think humility is the most important thing.

Trevor Wilby: It's the people skills. It's the people skills, it's the team building skills. Individuals need to be enabled, empowered, led, to be successful. If you have unhappy individuals, they're not going to work for you. They're not going to be successful. You also have to choose the right people for your team. So you've got to work it.

And then the other piece is, when you get all these people in the room, are they all the right people? Do I have the right people in the right spot in the bus? So you have to be able to make sure that you've organized your people and put them all in the right place. I think if you do that, and you only can do that because you're a leader and you have vision; you kind of know where the team needs to go; you've got the interpersonal skills to help them be successful, help drive them to be successful, then I think that gives you the best chance at the outset.

Erin Pitera (52:18): I think for us, it really just comes back to that client relationship management. And unless they're really, really good at that, they don't really go near as far. And so continuing to... I think some of that comes much more naturally to people, but you certainly can continue to develop in those areas, and I think if they're not really, really focused on that and continuing to develop and learn the client relationship management side of the equation, it just doesn't go very far for us.

KL: Is there a tool kit? Is there a field? Where do we learn that?

EP: I think that the best way, honestly, to learn some of those client engagement pieces is to be exposed to multiple types of projects. So for us, even when we think of how people move up in the organization, we tend to try to get people on all different types of engagements. We want to see that they have managed in large projects with high dollars. That has a lot of different skills that you need to apply, that when you're working on small engagements, sometimes even tighter dollars in terms of how you manage the client and what their expectations are... So we've always had this notion of, you need to be able to demonstrate it in multiple environments. And I think the client...well you certainly want to do some training on different techniques for client relationship management, and stakeholder management, and risk management, and some of the disciplines that can help with that.

I think people need to experience it. They need to be on projects. They need to have worked with more difficult clients, that may see not see the value in some of this, with clients that are much more cutting edge and really want to improve and change things. They have to be on that project where they've made some mistakes and they failed, and so to me, it is a little bit of a on-the-job type training, and they have to experience multiple environments before they really have honed some of those skills.

54:30: I would say it's the customer expectations management side of it. It's the... sure, you can get good people or you can manage the project, like I said, manage it to a budget, manage it to a schedule. But all of that doesn't matter if the customer that you're working for, you're not delivering what they're expecting, you're not delivering when they expect it, and if you're not delivering it in a way, over time, that they're happy with the progress, that they understand the progress. So the one thing I would say to anybody getting into the project management field is, worry about how you manage the customer as much as you worry about managing your own individual project. That's, to me, that's the key to success of any project manager in our business.

Ken Loy: You've got to be effective in communicating one up and two down. And you've got to be really good at being able to explain things to your boss so that your boss can explain it to *his* boss, right? Because that's one up. I'm not just telling my boss but one up above him. I've also got to be really good in communicating with my subordinates, so that their subordinates, and their subordinates' subordinates hear the story correctly. So it goes down to, if, as you tell your subordinates or anybody on your team, "This is what we need to do," they've got to be able to communicate it clearly to their people and to their people's people, so that it doesn't lose anything in translation. And if you can do that – think about communicating one up and two down – it'll show that you have really, really great understanding of what motivates other people, what their perspectives are. What you're going to communicate to your boss is going to be different from what you communicate to your subordinates, because his or her motivations and their pressures and the priorities are different from those other parties.

Jeff Mascott: The one thing that I would have PMs learn is to be able to easily manage when changes happen, and not see it as a problem, not see it as something to get exasperated about. But being able to say, "Oh, okay, here's a change, how do we adapt to it? How do we quickly move on? How do we quickly come up with solutions? And how do we quickly move forward?"

KL: Yup. PMs, this is the job. That's not the exception. That's the job.

KL (57:18): So what have we learned? Relationships are paramount. As Steve Williams said, hard to establish easily and quickly eroded. CEOs really need PMs who can manage customer expectations. You are that customer interface. Be vigilant for risks as well as opportunities. Be creative. Don't flip out when requirements or other parameters change; just be ready to adjust and move forward. As far as communication skills go, I like what Ken Loy said about being aware of how your message will be conveyed one step up the ladder, to your boss's boss, and two steps down, closer to the team that delivers the outputs.

The meme we hear is, "Good judgment comes from experience," which often comes from bad judgment. So that means basically, if the key to success in the executive's eyes is experience, and we don't want missteps, we need self-awareness and a certain level of self-projection as you build your resume with more and various projects of different sizes and levels of complexity, different

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types of stakeholders and work environments. Reflect on those experiences and document them. Build your tool kit and be ready to explain how you have learned even more about providing value. You'll know how to read the signs and how to adjust, so just keep doing what you're doing, but more. And be willing to express it.

Special thanks to my guests, Jeff Goldman, Tom Klaff, Ken Loy, Jeff Mascott, Erin Pitera, Jeff Powell, Pat Sheridan, Trevor Wilby, and Steve Williams.

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