83. Tips from Behavioral Science

DeBaets, Richards, Shields

Testimonial 1: Well, let's talk for a moment about University of Maryland Project Management Symposium. This is a chance to connect with colleagues across geographies, and also focus on what does it take to really stretch my thought leadership?

Testimonial 2: You have an opportunity to interact with your peers and hear from some fantastic industry experts.

Testimonial 3: And the speakers are always very engaging and interesting.

Kendall Lott: Yup, PMs, that was an actual commercial. It's almost spring, and that means the 8th annual University of Maryland Project Management Symposium, "Turning Knowledge into Practice 2021," is fast upon us. In fact, it's early this year, April 22nd and 23rd. Five tracks, 55 sessions, and a total of 44.25 PDUs, and all for $125. Well worth your time and money. Plus it's online, so you can attend from the comfort of your home, at your leisure.

For a kind of pre-kickoff event. I gathered three of the symposium's, keynote speakers around a virtual table to discuss behavior for this episode, "Tips from Behavioral Science."

Crystal Richards: It's very disheartening for me to hear that people are having endless lunch meetings, and I see people's calendars, and it's meeting after meeting, and I'm like, "Well, when you have time to actually do the work?"

Stephen Shields: We've discovered that when people manage folks according to how they're actually wired neurologically, they get a lot more done.

Shari DeBaets: We're all dealing with people, which means we're all dealing with decisions that may be biased. And decisions mean money.

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, Kendal Lott.

KL: Project management is about people: teams working with, for and through people. Especially now that all of our processes and working environments have been turned upside down or re-routed, how do we as humans relate to each other and adapt to change? And what about decision-making? At this round table, we covered things causal (What keeps us from maximizing performance?) to the mundane. (We love to hate meetings, but...) to the metaphysical (What is the role of self-awareness?)

Even with all the hard data, subjective analysis and its role in decision-making are the real drivers. Much of this discussion is around risk and decision-making, and being able to communicate it. So understanding human behavior is key to successful project management.

Grab a pencil. From tips that fly by, to a number of books you may decide to read, you're going to want to take some notes.

KL (02:49): First thing I want to do is just get everybody's names, in their own voice, if you'll tell us your name, what you do, and where you're sitting for the call today.

Shari DeBaets: Oh, hi guys, I'm Dr. Shari DeBaets, just call me Shari, I insist on that. I'm now calling in from Antwerp in Belgium.

KL: Excellent, thank you. What do you do?

SDB: Well, actually, I'm kind of feeling the odd duck out here, because I'm not a project manager at all, or a researcher in project management. My area of expertise is behavioral science. So we're talking here about the human aspect of working with people, which is... it's a necessary thing for project management. It's always, the team team that you're working with. It's people that you're working with. So you do have to take the people factor into account, which is what I'll be talking about at the symposium.

KL: The symposium is "Turning Knowledge into Practice," so I think maybe you're the key player in a lot of this. And this podcast is PM Point of View®, not "Points of View for PMs," so we will take what you have and we will see if it applies to project managers. I would imagine Decision Sciences have something to do with project managers and forecasting, just thinking...

SDB: Yeah, of course. So even though my background is in psychology, I somehow ended up doing a PhD in Applied Economics, and I'm focusing on judgmental forecasting, which is like a separate field in itself, which combines everything we know from behavioral science with everything that we know from forecasting science, and forecasting is really closely related to project management, because you're always forecasting. You're forecasting your budget, you're forecasting the people you need, your forecasting durations, which means that in project management, you'll probably have the same decision issues and biases that you will have in forecasting. So that's my link to your world actually...

KL: And it's a good one because in complex projects, forecasting drives a lot of other decision-making for people who are not sitting in the room when the forecast happens. Now, my understanding is that you might be speaking to some of the neuroscience behind some of this when you're on stage, is that where we're headed with the presentation itself, maybe?

SDB: Yeah, for the presentation itself, I'll be focusing on the institute that has been set up by Josh Ramirez. It's the Institute for Neuro and Behavioral Project Management Science. And actually, his input is mostly project management, his background, project management and risk, and the effects of risk on decision-making. And my input is the behavioral part about it, and that's what I'll be talking about at the symposium: Highlight some common biases that are made, how we can de-bias ourselves in our project teams, which is not an easy feat, by the way. But I don't want it all to be bad news, so... Yeah, that's the plan for the presentation itself.

KL: Well, and so for our listeners, our loyal listeners know that I interviewed Josh Ramirez at his institute at his location. I flew out to meet him, and that is podcast "69. Neuroscience and Project

Management," December 19, 2019.

We're going to be talking about some of your judgmental forecast and applied economics in the world of project management. So thank you very much.

KL (06:28): Stephen.

Stephen Shields: So I am in Ellicott City, Maryland, which is just south of Baltimore, I think not that far from you, Kendall. I am a senior consultant with Gallup, extremely interested in what Shari …I'm really fascinated about what her expertise is, her academic expertise. It's actually going to be a portion of my presentation during the symposium, which is how we make decisions.

We're a human capital consultancy. Your listeners may know that we've won – our senior scientist emeriti won two Nobel Prizes. Dr. Daniel Kahneman at Princeton won a Nobel prize in 2002 in economics for his insight that most of our decisions are emotional, coming out of the limbic system of the brain. But we'll be talking about how is that relevant for the people side of dealing with project management? Our organization doesn't focus on project management. I was a project manager when I was a Gallup client. I joined Gallup 12 years ago. About 15 years ago, I was in IT for USA Today, the United States newspaper, and I was a project manager. So I think there'd be an interesting synergy by what we both have to talk about.

KL: You're going to be presenting basically on how the world has changed for the workplace in the era of the pandemic, yeah?

SS: That's right, that's exactly right. Francis McInerney and Sean White wrote an investment tome many, many years ago called "Future Wealth," and one of the biggest takeaways I got from that book is that society changes as the cost of information declines. So if you think about how society changed when we could print a book, and all of a sudden the transfer of knowledge was enormously cheaper than when we had to have scribes who would physically write down on a book. And that helped, for example, precipitate the Protestant Reformation.

And then if you think about how much society changes when you have a radio. So FDR is able to go above the head of Congress and appeal directly to the American people to get Lend-Lease approved to be able to basically give the British materiel to fight the Germans before Pearl Harbor and the United States got into the world. And then fast forward to television, and then that changed the world so that John Kennedy wins the debate with Richard Nixon because he was prettier. Even though people who listened to it would say that Nixon was tied with Kennedy in terms of…

KL: That's why I do audio podcasts. Continue. [Laughter]

SS: But the point is, in technology, hardware goes first, then software, then people. And what's happened now, we always…not always, but…we have the technology to do what we are doing, right now. To work from home and work remotely. But what's happened with the… precipitated by the pandemic…that situation has forced us as people to catch up with the software, which has caught up with the hardware, and that has an implication for how we execute project management and other business endeavors.

KL: Now we would be remiss to have ignored the fact that former President Trump also changed

the world by going out on Twitter.

SS: That's right.

KL: He doesn't even run a press conference anymore, right? And literally has talked about, not just moral suasion, but policy can be expressed through small, small bits of information that are very readily accessible. So I think that arc continues, doesn't it?

SS: Yep, that's an excellent example. Because what that lets you do is the cost of information declines. Bypass editing, you bypass vetting, and it allows for a ubiquity of information. But it's raw and unfiltered, and that has an implication. It changes how we relate to one another.

KL (10:42): And let's see, we have Crystal Richards in there somewhere. Crystal, you out there?

Crystal Richards: I am! Can you hear me?

KL: Tell us where you're at and what you're up to.

CR: Hi everybody, I'm Crystal Richards. I'm based out of Bowie, Maryland, right in the Washington, DC-Baltimore areas, and I train people to be better project managers. So I am a professional project management bootcamp trainer, as well as going into corporations and training them from project management 101 to better risk management. And I'm also, what I lovingly call a Misfit Project Manager, in the sense that I'm not the hardcore IT or construction or software development. You know, the accidental project manager, which I think a lot of people can relate to, but also to... A lot of people who are attracted to having further conversations with me are the startup companies, the creatives who realize, "I'm a project manager." But the things that we learn in the Project Management Body of Knowledge, copyright... You have to make sure that people understand that you don't do everything, right? And you… I want to be a better project manager, but how can I distill all of this information? So my presentation is on the entrepreneur within you. How you can achieve success with your projects with an entrepreneurial mindset.

I think with what Shari is bringing in, and what Stephen is going to talk about… I'm on the second day, that Friday morning of the symposium, where those bits and pieces of what they would bring in, I see that through this pandemic, people have had to learn to be a lot more entrepreneurial. Be innovative, take risk. And that's a lot of what entrepreneurs have to do for their businesses. And I think that's what a lot of project managers have seen that they needed to do in the wake of Covid-19 with remaining adaptable in their organizations, but also just being very flexible and adaptable with their own career.

And I always have people asking me, wanting to pick my brain about, what is it like to be an entrepreneur? Oh, I couldn't do it. And then when I break down, "Here's what it takes." And they're like, "Well, damn, I am an entrepreneur in my own way!" So like, you can be an "intra-preneur" within your company, and have those entrepreneurial skill sets and mindset that can still help the organization that you work in.

And I think from a leadership perspective, if you're listening to this and you manage project managers, tap into the entrepreneurial mindset and capitalize on that, so the whole organization to benefit from it.

KL (13:37): When I was looking to find a way to think about the... What was going on, on the main stage, I saw the different topics and I immediately saw that all of you were dealing with behavior. In some way, what was indicated in your topics was something about how individuals show up in organizations, frankly. From how they might see their mindset differently, to how they make decisions to, What is the very nature of an organization that they're in? This is all behavioral science, and that shouldn't surprise us. The management in project management is strictly a behavioral issue, right? It's about how people literally use and view and report on, control, all sorts of things, with resources, right? Working with and through others. So for each of you, as you look at what you want to present, in context of what you're interested in, fundamentally, what do you think is not being maximized in the workplace? Shari?

SDB: Yeah, it's not an easy question, but what I do think is currently still lacking a bit in project management is everything from Biases Research, and I'm referring back here to what Stephen said, all the work by Daniel Kahneman and Amos Tversky, who won the Noble Prize for this by the way. Before them, they said that people are rational actors, so you had what they called the *homo economicus* – the rational actor who takes rational decisions. But, as we all know and experience, people aren't rational. So Kahneman and Tversky came up with the heuristics and biases framework. And I feel that, although this has existed for almost 50 years now, their first publication on it, it was from '74, it's not really that integrated yet in project management approaches.

So there are a number of biases that can play a big, big role in decisions you take and decisions mean money after all. And we should learn a little bit more about it, about which biases exist and what we can do about it. And that's not yet, as, to my feeling, it's not yet a big part of project management. And maybe it should be, because, as you said, we're all dealing with people, which means we're all dealing with decisions that may be biased.

So speaking from my fields, biases and forecasting, I think we can apply those same biases in project management. And there is one bias that has already been researched a bit, and that's optimism bias. You'll surely have heard of it, we all suffer from it. It's a bit similar to planning fallacy. We always underestimate how long it's going to take, we underestimate how much it's going to cost, we underestimate how many people should be involved. And we constantly, in projects, go over budget and over time. So there are some ways to mitigate this. But since biases are not really a hot topic, I want to focus people a bit more on that. And it would mean simply by focusing on just that one bias (and unfortunately, there are many more) just by focusing on that one bias, you could already have more realistic planning, which would mean more savings in time and maybe in budget. So that's where I'm coming from.

KL: Well, I'm really intrigued by that. And all project managers should be taking heart with this bias because you just let us off. Thank you! Because you just told me the reason why I'm over budget and over schedule is because I didn't tell you the right answer the first time. Not because something's wrong with management, the way we did the project. Hmmm. So actually, I suspect that sometimes we have that and that would mean this optimism bias might be covering some of those other fundamental flaws that might be going on. I don't know, I'm just putting that out there as a thought for just a second.

And I also experienced optimism bias. Anyone who has done some project management, Shari, we do see it another way, which is, if you've ever asked a project manager once you're 30% through the

schedule, you know, you're into the project pretty deep, every task is 90% done. And they never get the last 10%. Everything is like, "No, no, it's 90% complete." And then that last 10% takes you 70% of the project. So that's one of the ways we see it done in the planning, the driver to the planning bias, but just in the flat out optimism bias.

SDB (18:31): There are plenty of reasons that we have an optimism bias, and that's what makes it so complicated. We over-promise to our customers just to get the contract, which is optimism. We want to show off to management that we can do it in a shorter time. But actually not all reasons for it are external. There have been neuro-scientific studies that show that the same part of the brain lights up when planning, than when we think about positive things. So it is really ingrained in our brain that we think of positive things, when making a planning, which means that we kind of ignore the negative things, which means that we ignore the risks and what could go wrong, which leads to an under-estimation of costs and just an overall "We can do this!" feeling in a shorter amount of time than is realistic. So it is in our brain, there are external factors that stimulate us to be over-optimistic. So it's quite a difficult thing to handle.

KL: You remind me that all of us in project management thought we were special because we love planning. You just told me that that's like a thing by being Homo sapien, and that makes me sad, because I thought we were special. But I have a theory underneath that, that maybe we'll have to take offline or talk later, which is, I think the reason we're biased towards planning is because we all like telling stories, ideas of things that are not in evidence. And so it's our ability to misrepresent facts as they are that makes us like story-telling...

SDB: Yeah, that's actually the whole conclusion of the field of decision-making, is we think we're special, but we're all the same, and we make the same mistakes.

KL: We're all special together.

SDB: We're all special together.

KL (20:28): Stephen, what's not being maximized from what you're seeing?

Stephen Shields: Yeah, the under-utilization of human capital. Because we're managing people under an old neurology. For example, during World War 1 and World War II in the United States, that's when our current performance management system was developed, under the rubric that most of our decisions are logical, rational, prefrontal cortex decisions. And so if I report to you, Kendall, and I'm a logical rational robot, you really do only need to meet with me once or twice a year, because what I basically need from you is information. Because I'm a laptop. And so we don't need to meet that much or you can deal with me exclusively programmatically, there needs to be no organic relationship. But the problem with that is that you're not managing me, as Shari just detailed, according to how I'm actually wired.

So 28 years ago, Gallup came up with an assessment that evaluates the culture of an organization with regards to their engagement. We didn't coin the word engagement, but we did introduce the word engagement into what in 1993 was called "Employee Satisfaction Surveys." And up to this point – well, in the last five years – 12 million people, 12 million clients, have taken that particular survey. And we've discovered that when people manage folks according to how they're actually wired, neurologically, they get a lot more done.

To give you a taste of the survey, one of the questions is question number seven, "Do my opinions count at work?" Question number five is "My supervisor or someone at work cares about me as a person." And the way we found those questions is that 28 years ago, we tested thousands of candidate questions with about a million people. We went to the employers of those million people and asked them by your quantitative and qualitative criteria, is this a high performer, an average performer or a low performer? And we used a likert scale, a five-point scale, and we looked for verbiages or phraseologies where the high performers gave them fours and fives on the likert scale, and the low performers gave him ones and twos. And so those 12 questions are the ones that had the strongest statistical correlation with productivity.

And this is my main point: we re-test those questions every three to five years. In October of last year, we released our most recent meta-analysis with 2.7 million people, 276 organizations, 96 countries and 54 different industries. And we went to those organizations, the 276 organizations. We asked them to give us the performance metrics on those 2.7 million employees. And all Gallup did is that we gave all of them the employee engagement survey, and we simply compared the performance of the top 25% of the most engaged to the bottom 25% of the least engaged. Of 2.7 million people, those who were most engaged made 41% less errors.

When we looked at customer satisfaction, we found that the top quartile of 2.7 million people had 10% higher levels of customer loyalty. However the project manager or the manager defined productivity, the top quartile of 2.7 million people, by variable quantitative and qualitative criteria, had 14% higher levels of productivity. Why? Because they had project managers or managers who are leaders, who encouraged their development (Question # 6), cared about them as a person (Question #5), listened to what their opinions were (Question #7).

And so it turns out that the right way to manage people – managing them according to how they actually make decisions – is also the smart way to manage people. And because people haven't caught up with the most recent neurology that Israel's Dr. Amos Tversky, as Shari said, and Dr. Daniel Kahneman, Princeton, were able to determine, they're managing people like logical rational robots, they're missing out on optimizing their human capital.

KL: Wow, I'm going to go deeper with that, that's really fascinating to me. I'm going to challenge then that the very word "management" is a problem for us. The root being "manus", put your hand in, to control, and is a cognate with the word "manipulate." They come from the same word. It's putting your hand in, to control these resources. And it sounds like the very concept of management, in the way you just described it, may be the wrong way to think about it. It may be I'm a project, human developer or an enabler or an empowerer or something, and I think we need to see it still in business, but it is interesting, when we say, "It's just business, it's not personal."

SS: Yeah.

KL (25:45): Crystal, what's not happening? What's not being maximized from your viewpoint, that's keeping us from having optimal performance or improved performance?

CR: Just like what Shari said about being kind of a tough question, I was thinking through it and then I had that in my head, setting boundaries. And I think it speaks to what both Shari and Stephen were getting into with the optimism around our planning and the optimism bias, and treating people

like humans, and being a people leader as opposed to people managers. I love all this knowledge that's being dropped, and I think that's what's caused us to not have the boundary setting. It's very disheartening for me to hear that people are having endless lunch meetings. And I see people's calendars and it's meeting after meeting after meeting. And I'm like, "When do you have time to actually do the work?" And even setting boundaries for yourself, not only as the worker bee, but also as the leader. When you don't show yourself demonstrating how important it is, so that people have that break.

The breaks allow you to re-charge, be more creative, and maybe be more realistic around your planning. But when we have these outlandish planning dates, that causes this ripple effect to be the hero, right? And you can't get the work done and then, (surprise!) you're burned out because...And you make mistakes, and then you have to re-work, and lo and behold, we're late on our project, there are quality issues. Give your folks a break. Give yourself a break. You need that time to recharge and be more innovative and creative, and I think that's something that's not being maximized.

KL: So to make sure I understand that, you're suggesting that we're over booking ourselves.

CL: Yes! Give me a lunch break! I know of a company where it is a company-wide policy where they put it on everyone's calendar. Lunch. We're not scheduling meetings.

KL: Connect that for me, if you would, to what you would be talking about, that entrepreneurial, indeed "intrepreneurial" in a large organization. How does what you will be talking about, that sense that you're trying to convey there, tie to this? The overburdened schedule. Is it keeping us from something?

CR: Absolutely, it's keeping you from being creative, having that downtime to develop yourself, something that Stephen had talked about in his piece. We need time to develop our skill sets. We need time to just connect with a book, a person in our household, another colleague. And if every interaction is about work, work, work, work, work, and by the time you are done with emails, and what we're finding, what I found – because I struggled with those boundaries as an entrepreneur – is that I'm missing out on opportunities to be more innovative, to brainstorm with others, to come up with ideas on how to build a business. And if everything is just checking off the list until you're finally done and you don't have time to have a feedback conversation…I mean,we're just missing an opportunity for being a lot more realistic about our planning, being a lot more realistic about the way we work. We just go on to the next thing. So…

KL: One of my staff told me just yesterday, "I no longer tell my friends or my family," when they're checking in on him, "It's not that I work from home now. I live at work."   [Laughter]

SDB (29:41): Time pressure is not just taking away our time to look back and learn from previous experiences; it's not just taking away from our possibility to be creative and connect and everything Crystal said, it's also pushing us toward making faster decisions, which means we use a lot of mental shortcuts. And it's those mental shortcuts that can lead to biases. So actually time pressure increases biases as well.

KL: That's going to get back to Kahneman's world of the fast and slow thinking

SDB: Exactly. The fast and slow, by coincidence, refers to what they call the two systems in our brain. So we've got System One, who is intuitive and gives us the mental shortcuts and makes us make really quick decisions. While System Two is the more slow, more elaborate system that makes harder-to-take decisions that are more conscious.

And yeah, you've got to actually, you've got the field of Kahneman and Tversky, who see these mental shortcuts as sort of a negative thing, because they focus on the biases. But you've got another camp in decision-making, and they've been going at each holder for a while. And that's called the "Naturalistic Decision-making," by Klein and also by Gigerenzer from the Max Planck Institute in Germany. And they focus on the good things.

The main example that Klein always gives about the good thing about time pressure, mental shortcuts, is that if you have the expertise, you can rely on them. And the example that he usually gives is about people in the fire department who can predict when a building is going to have a blow out, or is going to succumb to the fire. And they can't really explain how they see it, but they do call back their firemen a few seconds or a minute before it actually happens, so that is…When you have the experience, those mental shortcuts can really help us out. It's not all negative.

And there's an interesting paper, it's very readable, even for non-academics, I absolutely love it, and it's called "Agree to Disagree," and it's written by Khaneman and Klein together. So the two camps came together and they said, "Well, actually, we are not two opposing games. We are looking at the same thing, but in one case, the biases are based on expertise, which is a good thing, and in the other camp, you have the biases, which are just mental shortcuts that we use that we actually shouldn't use.

KL (32:39): Let me throw some meat on the table though. Because you guys have opened something. Project managers have been known to go to meetings. They've even been known to call meetings. And we just went through a round here where we were suggesting maybe sometimes we're over-booked in our meetings. But I'm going to put out on the table that there is a line of thinking, in fact, a behavioral tendency for many people, from a personality style, that meetings is where it's at. Meetings is where collaboration happens. Meetings is where the innovation happens. Meetings is where decisions are made because of rules of advocacy that happen in a room – the devil's advocate, the role of affirmation and confirmation.

So here we go. For our team, panelists, Meetings. Good? Bad? Coming from where you're coming from, what do I need to be thinking about when I'm thinking as a project manager about my need, my execution, my reflection on, my call to meetings...

SDB: Well, actually, I think we have to make a distinction between 90% of the meetings versus 10% of the meetings, in which the 10% are useful ones, and all the rest can be done another way. And I think, if we have to take a positive outlook, if possible, on Corona and lockdowns, and everything that happened, is that these, these superfluous meetings have been scrapped. At least that's what has happened at my university. If it can be put in a document, if it can be put on mail, it's simply put on mail. So meetings where you're just sharing information as a person and not interacting, those are the ones that should be left out.

Then you have those 10% meetings that can be useful. But it really depends on a lot of factors. It depends on, for instance, like you said, the personality styles. If you have someone who is really

loud and dominating, well, the end result won't be a collaboration or a synergy of ideas. It will be the idea of the one who's the loudest. So you should see who is there, if you're comfortable interacting with them. There's also a high cultural aspect. I know that Americans have no problem speaking up in meetings, in personal experience. Europeans are a bit of a middle. But if we go to the Far East, it can be considered impolite to actually give your idea if it's not the same as the one higher in rank. So there are many factors that are at play here, and I don't think we can say meetings are bad or meetings are good. Some meetings are good and can be useful. And some meetings are bad.

KL: How does a meeting affect bias?

SBD: Actually there's one main bias that is an issue, and it's called Group Think, and that is the fact that if a few people say something like… If four or five people say A, the fifth person will have trouble saying B. And they had an experiment on this. They call it the Asch Conformity Experiments. I think it's been in the 50s, so it's been quite a while ago.

And they had a group of people sitting in a room, let's say 10 people, but nine of them were fake participants. So they were collaborators, just from the department, and then the tenth person was an actual participant, an actual volunteer. And Asch presented three different lines next to each other, a very short one, a medium sized one and a really long one, so the difference between the three lines was obvious. And then he asked them one by one, what is the longest line? And he had all the fake participants answer B, the middle line. And what they found was that the majority of the people that were voluntary participants who were sent in the room, and had heard medium line nine times before that, actually said medium line as well.

SS: That's beautiful.

SDB: And that is the main danger of meetings, and that is Group Think. It's that once two people agree on something, the third person will tend to agree on that as well.

SS (37:10): A mental shortcut that I use during meetings is something I read an article, a journal article a few years ago, on the advantage of brain *writing* versus brain *storming*. So for example, when I'm action planning with a group around their survey results, or doing some other kind of project management with one of my clients, I'll say, "Everybody take out a blank sheet of paper. You have 45 seconds. I want you to write down every issue you can think of that makes it hard for us to do our jobs." And what happens with brain writing, it has a couple of advantages. By the shock and awe of… you've got 45 seconds to write down the hardest things about your job, it forces them into the limbic system of their brain, and it actually acts as a brilliant prioritizer. Because they're going to write down things that are actually kicking their butt. They're not going to write down insignificant things, because you've made it an emotional endeavor.

And then what I'll say is, "Circle one issue that you think we could actually do something about," and then I'll have everybody share what they circled. And in the 12 years or so I've been using that, what's awesome about brain writing is that everybody shares, and it helps you to defeat that Group Think, because you're getting unique ideation from each individual. So that was my specific comment.

But I'm going to say that meetings are all moral. I'm going to say that they can be good or evil, and

I'm going go back, Kendall, to the etymology of management, which I'd never heard that before, that is fascinating. I didn't realize management was etymologlically about control. We did a study of 80,000 managers, I'm going to say 29 years ago, and it was when we were forming these 12 engagement questions. We looked at the performance metrics of their teams, and then we tried to discern unique behaviors of managers of high performance teams of the 80,000, versus the behaviors of the managers of poor performing teams. So for example, notes after a meeting, every manager does that, so that's not a differentiating behavior. One of the characteristics of the higher performing managers that's relevant to your question about teams, is that they were commanding about outcomes and collaborating about the means to achieve those outcomes.

And so that's why I think it's important that we don't depreciate the prefrontal cortex, the decisional part of our brain. There are times when managers have to make difficult, unpopular decisions that people are not going to like. We're not saying that it's a 100% limbic system. There's a synergy between that decisional part of our brain, what Kelly McGonigal at Stanford... Dr. Kelly McGonigal calls willpower, what Dr. Angela Duckworth at Wharton School of Business calls grit, what the neurologists call prefrontal cortex, there's a synergy between the two that balances command and collaboration.

A meeting is a great opportunity for those two to come together, if they truly come together. If it's all command, it's not going to be – in most circumstances – its not going to be a good meeting. But if it's just, "What does everybody think? Let's just share what was on our mind," that's also not helpful. It's got to be a combination of direction, of command, and collaboration. Command and collaboration.

KL (40:41): I like that idea of the mix, but I believe there's another step in it. I believe meetings should be fit for purpose. So I will buy that you have two poles and there's a string between them and you're trying to get that mix, you're trying to pull up a tension where it should belong, but that some meetings may need to be, I'm here to tell you what we need to do so you can go start knocking on doors.

Another one could be, we don't know what to do, we're in a brainstorming scenario where we are trying to simply generate ideas today. Period. Outcomes are...everyone is heard, lots of things are heard. And there's a mix. So I like your mix framework. Go ahead, Steve, you were going to say.

SS: I was just going to say Michael Watkins in his wonderful book, Harvard's Michael Watkins, his book, "The First 90 Days," the mistake, he talks about this, a mistake that a lot of project managers make is that they don't label the meeting. In other words, it should explicitly be, This is – to your point, Kendall – this is a meeting where I'm going to tell you what we're going to do. Or, this is a meeting where I'm going to ask for your opinion, and then I'm going to decide. Or this is a meeting where we're all going to decide what we're going to do. By labeling it, it increases perceived integrity, and it also makes people more emotionally invested in the decision-making.

CR: I want people to know why they're coming to the meeting. So I try to provide a purpose, like brainstorming meeting, decision-making meeting, we need to make a decision on this. So I'm a huge believer in Agenda. Even with my clients, when we have like a 20-minute meeting, I have three of these three bullet points on an agenda of what I want to do. Now here is what I have found to be so, so helpful, and this is – I got this from a Harvard Business Review article – put your agenda items as a question.

SS: Yeah.

CR: Because when you answer the question, you know you're done with the topic. And when I transformed my bullet points, as opposed to "Next Steps," I would say, "What are the next steps for moving forward with training?" Like, we could actually answer... And it was such a productive meeting.

And this is not scientific research for me, but I have noticed just kind of ballpark, Number One, when I put the purpose, when I put the agenda items as a question, I had more people keeping the appointment than if it was just something generic, or if I just had an on their calendar. Because people want to know, is it worth their time? Do I need to be there or do I need to present somebody as my alternative? As opposed to just flat out skipping the meeting. And I think that's where the challenge with meetings is that people don't know why they're there.

SS: That's good is.

CR: And this goes back to the whole boundaries thing is, Should I... Should I be here? What value am I going to provide? And then you sit there and you find out, this really could have been an email. But it's also the issue to – this is for a totally different conversation – but I recognize that people show up to meetings because there's a lot of office politics and turf wars, so you want to make sure you're not missing out, but it just seems like that…

KL: You just walked through an open door! We're going to culture next, but before we go there, Stephen has…

SS: Just one comment about meetings, email, texting, video, conference, etcetera. The communication mode needs to be commensurate with the emotive content of the communication. And a lot of project managers don't get this. Example: don't have an argument over email. It doesn't work, because you'll be going on and on forever. I was recently working in an email stream, somebody got what we in the South call *cattywampus*, which means they got upset. And they started saying something in email like, "Wait a minute, you said last week that…" They started talking that way in the email, and the life lesson I teach my clients is that when that happens, abandon email! Right?

Email is great for "Where do you want to go to lunch?" Or "What time is the podcast?" It's terrible for... "Wait a minute, Crystal, you told me that…" It's terrible for…

CR: "Per our last conversation…"

SS: Right! [laughter] Because texting and email has this much sensory bandwidth. The telephone has a little more, because you can hear my affect. Then video conferencing has a little bit more... because you can see my gesticulations; you can see me. And then of course, the reason why we don't fire people by text or break up with people by text is because face-to-face has the widest possible sensory re-bandwidth. And managers, again, subscribing to that old neurology, they put everything in email. Why? Because it's so efficient to use email. Because it's always faster. But the problem is, it's pay me now or pay me later. If Crystal and I have something to fight about it, we can go on forever on texting and email, or we can just get together and work it out.

KL (45:41): What is the role in self-awareness in being effective, versus incapacitated, as a professional, as you work in an environment?

CR: When you're in your 20s and 30s, you... I'll speak for me… I was probably a lot more emotional, a lot more hot-headed. And you learn from that. Now, I have learned, I'm going to walk, I'm going to step away. Right? So that's the self-awareness of, I think I'm upset right now, and I don't think it will be a good idea to respond. And unless they said it's an emergency… but I do believe in the relationships, and I think when you realize I just don't want to talk to this person, or I'm not sure, that is maturity. That is growth in recognizing, "I'm upset," versus, "This is what our conversation was," and I think it's...

If I find myself, what I've started doing is if I find myself upset, I might draft it out, I don't put their name in the "TO" yet. I might even actually take it out in case I accidentally hit send. I think it's really important to understand the relationship you want to have with this person, because it does make a difference. Obviously, if it's a senior executive or your sponsor, you want to be as diplomatic as possible. But sometimes you do have to put the truth out there and it still requires some diplomacy, and that's where... Is it a phone call? Is it an email? I think the email now, with everyone right now working from home, we're just overwhelmed.

The latest research I saw was that the average US American worker has 199 unread emails. And it's a matter of... Of course, people are like, "Did you get my email?" So it's double that too, with trying to get through all the noise. And then of course, it's the back and forth, or something that you were saying, Stephen, is some of the back and forth emails could have just simply have been, Pick up the phone, and the misunderstanding could have been alleviated. And I think that's where we have to give ourselves the benefit the doubt of picking up the phone sometimes and saying, "Hey, I just want to make sure, because I know you... I know you have a ton of email, I have a ton of email, Can we resolve this right now?" And that person may have said, "Resolve what?" And it's just their mannerisms to be very straightforward and not put the niceties. And it's not anything to do with their personality. The way people's email persona is different from their phone persona, so I would always say give them the benefit of the doubt and pick up the phone and start that relationship. So now that when you subsequently get the emails, you just know that that's just how their email nature is. And it's not to say they don't have any training, it's just...Some people just don't have time to put flowery words behind. It is just, this is just how it is, and you have to be careful about trying to interpret too much in the email, and look at the context. And sometimes it is having the phone conversation to develop that relationship, so that you can separate the two.

SS (48:52): I certify coaches for Gallup, executive coaches, for Gallup. And one of the things I teach them when I go into the neurology of coaching is basically, what you're doing with people is helping them to leverage their prefrontal cortex to manage their limbic system. Or to put it more colloquially, helping them to use their rationality and decision-making ability to manage their emotions.

Well, we don't need a coach to do that. We can do that ourselves. And we do that. The criterion of awareness, when you need to give yourself space to be human, and the phrase I use for that is "build in the pause," is emotion. When you're anxious, when you're depressed, when you're mad.

To give an example, during the Civil War in the United States, when Lincoln would get really mad

at one of his generals fighting the South, he would write what he called a "hot letter," and just excoriate that general, and talk about how awful that general was. And the only reason we know about those letters is because after he was killed, all of those letters were found *unsent* in his desk.

Because what Abraham Lincoln understood is that, go ahead and write the angry email. Just write it in Microsoft Word. Don't write it in Outlook, right? Get it out. And he built in that pause so that he could go off and reflect and think about, "Okay, what should I do in this situation?" And Crystal, to your point, that's the terrible thing about back-to-back meetings. It doesn't give us any space to process, any space to be human. We're completely in reactive mode, and it doesn't let us be proactive in terms of what we're doing.

KL: So from a self-awareness perspective, what are we counting on to know about ourselves there? What is…is it to know that you need a break? I'm not a break in time that you need a *brake* on your action to stop and not hit send?

SS: Yes.

KL: Is that where we're coming from on this?

SS: Yeah, never email mad. When you experience, for example, an amygdala hijacking, that's like when a saber-tooth tiger comes in front of you, or somebody pulls out a gun, or somebody yells at you, there's a hormone release that actually depreciates prefrontal cortex activity. It actually makes you more dumb and use less logic, right? Because when someone's slamming on the brakes in front of you in the car, what you don't want to do is go, "Hmmm. This is potentially a very dangerous situation. I need to think through this very carefully." You die if you do that, right? Well, the problem is, in situations that are not life-threatening, we still fall into an amygdala hijacking and we make stupid decisions. And we've got to give ourselves that space to process, to calm down and to deal with the emotional situation and think through what's the logical thing to do in a very, very emotional situation.

KL (51:51): Crystal, I wanted to ask you, assuming someone's heard your presentation at University of Maryland, and they've drunk the Kool-Aid, "I feel the entrepreneurial within me!" whatever… What is the role of understanding what you will be speaking about and the act of self-awareness as they go in? Connect those two. What does that mean when they go forward?

CR: It comes down to understanding what an entrepreneur is, right? It's a risk taker, someone who wants to…sees a need, takes risks, and is interested in the rewards of taking that risk. Having said that, that's what we do the moment we're assigned that project manager role. We have to be thinking about all the risk implications of doing this work. What could go... What could go wrong? What could go well? And I think I just want people to understand that you're in this role because, number one, a lot of us, we know how to get stuff done, right? As a project manager, we love managing and being entrusted with resources, and here's this chaos, make it work!

And that's the entrepreneurial spirit. There's this chaos or this need for your expertise and your insight, your innovative thinking. And once you are aware of... You have what it takes, not only in that project management role, but also in bringing that entrepreneurial mindset within your organization to bring in more ideas and innovation into what you do, and taking time to step back and pat yourself on the back for your successes.

Pat yourself on the back for recognizing what didn't work well. I think that's where the entrepreneur...I think we're a lot more vocal about, "Well, that didn't work." But in Project Management, I've yet... There's very few presentations where I hear about, "Well, this was a colossal fail," and, "This is what I learned." Like, nobody talks about that. We talk about these great projects that…success…

But we need to talk about the failures and how we can learn from that. There's this great website that's all about project failures, and I think it's fascinating to see, and they put down the lessons learned. But it's all the things that we go to…you know, over-promising, unrealistic expectations and requirements, this ridiculously unrealistic deadline. And that's something that as an entrepreneur, I've learned to take those lessons and try to modify it and be better in what I do. And that's where something I want to encourage people from that perspective, as project managers, we don't talk about that. Like, take that information so that you can learn and then also be a teacher to others.

SDB (54:52): In my experience, that's actually something that's really missing from forecasting. So I've talked with lots and lots of companies, and they asked me, "Can you analyze our performance?" And I said, "Yeah, sure. What is your... What has been your forecasting error of the last months? And then silence follows. Nobody knows. So people aren't taking away the necessary lessons because they're simply not looking back, and it's only by looking back that you can move forward. So, as Crystal indicates, you need to know when you fail, *why* you failed. And you need to really... They didn't even know *if* they were failing. So they didn't know their size of the error. They didn't know if they were over-forecasting or under-forecasting. So it's something that's a bit of a... It seems so reasonable for us to look at past results because that is how we do research, and that is how we learn and how we advise. But it's not integrated yet in lots of companies.

KL (56:06): Well, why don't you go ahead and roll on here with self-awareness in the role of handling these biases and working with that.

SDB: So first, I'm going to start off with a negative message. De-biasing is really hard, even if you know your bias. So even me, as a bias researcher, I have the same biases. There is one, called, and you'll probably know this one, it's called escalation of commitment, or "sunk coast fallacy." And that means that once you start putting money into something, it's hard to stop, even when you're getting clear signals that it is failing. When do you stop putting effort into a project that is obviously failing, if you've already invested so much? So you can know the bias, but still have issues with it.

Then, on the positive side, I would like to say that there are some biases that we can prevent by doing exactly what Crystal indicated, and that is looking back into the past and learning from that. And there are a few measures you can take, but again, that is going to be for the symposium, and I'm not going to tell on that yet.

KL: How is that for a cliffhanger? Knowledge into practice, right here on the podcast, and we didn't actually even hear their actual presentation content. You can get resolution if you sign up now for the 2021 Project Management Symposium, hosted by the Project Management Center for Excellence at the University of Maryland.

So as with all human endeavors, project management is inherently a behavior-based field. Besides

the teamwork and stakeholder element, understanding yourself as well as your colleagues, we also have forecasting and decision-making. How do our biases affect the course of action we take? When can we rely on our intuition? And meetings, meetings, meetings. Let's be clear about the purpose and be sure to allow for breathing room.

By the way, a propos of some of the topics we've covered here, I urge you to check out some previous episodes of PM Point of View®. We have Project Failure from November 2015. And Episode 36 from 2017 is all about risk. And, as noted in the recording, # 69. Neuroscience and Project Management, from December of 2019.

Special thanks to my guests, Dr. Shari De Baets, Stephen Shields and Crystal Richards. If you want to hear their keynote talks or attend any of the excellent smaller sessions, registration is now open at PMSymposiumUMD.edu/PM2021.

Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post-production performed at M Powered Strategies.

KL: PMs who have listened through this complete episode may submit a PDU claim, one PDU, in the talent triangle, Leadership, with the Project Management Institute's CCR system. Due to changes in the PMI-CCR system, you must follow the new protocol. First, be sure to choose the fourth option, "Online or digital media," on the report PDUs page. Manually enter provider code 4364 and select M Powered Strategies. Manually enter the name of the episode, PM POV0083 Tips From Behavioral Science, in the course field. Enter the date that you listened to the podcast. Select "leadership" in the talent triangle, and check the box to confirm the validity of your submission, and hit submit.

Tune in to next month's episode, another round table, this time with a team of industrial organizational psychologists from the University of Houston, Clear Lake, who were charged with helping the university adapt to a virtual environment when the pandemic hit.

Visit our Facebook page, PM Point of View, to comment and to listen to more episodes and get transcripts. Leave comments on PMI's ProjectManagement.com portal – I like to read those. Evaluate us on iTunes, and of course, you may contact me directly on LinkedIn. I'm your host, Kendall Lott, and, as always, keep it in scope and get it done.

Announcer: This has been a Final Milestone Production, sponsored by M Powered Strategies.