0:00:05.3 Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View, the podcast that looks at project management from all the angles. Here is your host, Kendall Lott.

0:00:15.4 Kendall Lott: Hello PMs. Yet one more recording out of the 10th Annual UMD Symposium, and this one's a doozy, featuring a closing session debate. Two trainers and thought leaders in project management and PMOs, Crystal Richards and Laura Barnard face off on the question, should we rely more on process or in underlying principles when we first endeavor to tackle these projects? Both matter, but what should we lead with? We cover stakeholders, quality, risk and communications. Where are the hidden traps? Where are the risks? Listen and find out.

[applause]

0:01:03.5 KL: Good afternoon. I'm Kendall, and here are our guests. We'll proceed with our debate forum. Apparently, there was a flip of the coin earlier some months ago, and I believe Crystal, you're gonna be opening with an opening statement as the champion on Process.

0:01:16.7 Crystal Richards: Alright, thank you very much. I am Crystal Richards and I am team Process. I appreciate the fact that PMI has updated the seventh edition of the PMBOK guide to be more principles and outcomes-focused. However, I find that process-based gives you the structure to really follow steps. When I mean steps, I mean the process groups, the knowledge areas, the 49 project management process, and when you follow steps, you know which ones make sense, which ones don't make sense for you, and it allows you to be able to increase efficiency as well as try to minimize errors. Additionally, it allows you to align better what the stakeholder's goals are to your project, and it allows you to predictably... More consistently predictably achieve the outcomes of your project.

0:02:07.8 KL: Thank you. Laura, your opening comment.

0:02:10.5 Laura Barnard: Hi everyone. Laura Barnard. I love seeing all of these beautiful faces. Thank you the University of Maryland for having us here. Yes, I agree, Crystal, that the right process can be magical in helping an organization get things done. And there is a reason that no matter how perfect your process is, you don't always achieve the results your business leaders are looking for. There is a reason that they run in the other direction when they see you coming, and it's because they can't get from your perfect process to why they should care. And that's the problem with having a process-first approach. Before you ever figure out the right path to get to the results, you have to make sure you understand why you're doing what you're doing, and what success looks like. We help organizations all over the world and have been doing it for decades, and so have many of you, and yet there is this gap that exists when we go process-first between the business leaders and the outcomes they're trying to drive, and the project people that are trying to get things done through that process.

0:03:27.6 LB: We have to learn how to use process for good instead of evil, and it has to be about driving results. So, instead of focusing on perfecting process and going with the process-first approach, we must make sure that we understand outcomes we are driving, the business results we must get to, and then and only then can we use process as it was meant to, to get to the right results. It's outcomes over outputs.

0:04:00.0 KL: Positions have been staked. I think I will go ahead and speak on behalf of the audience sitting behind me that we're glad we're not in the business of doing evil, so I appreciate that. Whatever we're doing, we won't be doing evil. Your comments, both of you did mention stakeholders, and I noticed in your opening comments in your prepared work, Laura, you particularly talk about what I would call a difference in attitude, and the two of you seem to have... Appears to me around stakeholder. Your focus is on stakeholders, you mentioned getting to them. The effectiveness that you called on that seemed to define good project to you, Laura, seem to hinge on that connection with those who care about what you're producing this stakeholders, that focus there over the process itself. With that, Crystal, from a process perspective, how do you actually approach and plan for stakeholders which we all know are important? What is your approach for incorporating that key element of project success?

0:04:50.9 CR: Absolutely. I think it's important to... Just when you start out with your projects, who are the key players who wanted this project in the first place? And one of the things that I always make sure I always coach my students in is A, when every time you talk to a stakeholder, thank them for their time, and then ask, "Who else do I need to have to this conversation?" And I think when you have that consistency and that step of identifying who are all the key players that could make or break my project? That is something that I always consistently think about from the identification of stakeholders and figuring out what their intentions or what their desires are, so that I can make sure I meet or meet in the middle in terms of their expectations.

0:05:32.8 KL: So, we have a process response to that, to make sure that we have the continuity that we need. Laura, response to that. 30 seconds.

0:05:39.2 LB: It's not just knowing who the right stakeholders are, it's knowing what questions to ask them. And it's a great question as to, who else should I talk to? But also, we need to ask a very basic question, and it is getting missed far too often. Why are we doing this? If you don't know why you're doing a project, the process could be perfect and you still aren't gonna get to your outcome. So, you absolutely need to have all of the stakeholders engaged, but you've gotta ask better questions.

0:06:10.1 CR: May I counter?

0:06:12.2 Announcer: Oh, please.

0:06:14.0 CR: And this is why you create a project charter, because the project charter is at least your starting conversation to not only sell this idea, but to find out what their expectations are. So, that then you can flow into the next step of identifying who those players are, so that you can make sure that you identify what their expectations are of the project.

0:06:34.7 Announcer: I'm so glad you went to project charter. I'm gonna start with the next comment or question that I have for you. Let's dig into some of the areas. Being old school, I'm still trapped in the old PMBOK a little bit, but I think there are some areas that have carried over, and one of the key ones reflecting the charter is scope. So let's start with meeting scope. Laura, your emphasis on stakeholders seems to be focusing on having them happy and engaged. You defined it as happy and engaged. Is there an objective reality to the success of our scope? What I'm hearing from you from a principal perspective is, a stakeholder is happy, that means we have a successful project, but is there an objective scope that we have to achieve irrespective of their emotive

responses to our work?

0:07:19.0 LB: Yes, and that should be done before you get to charter in a business case. Because we're not asking... We're jumping to this project should be done, we haven't even determined if it's the right project. It's not just about doing projects right, it's about making sure that we are doing the right projects, and that means we have to ask questions about why we're doing this, what the business outcomes, not just how perfect our outputs are gonna be, but the business outcomes need to look like, and measurable success criteria. That is a big thing that's missing that many of you don't even have before you start a project. And so, you are forced to measure your success by on time, on scope, on budget, because that's the only metrics that you have, instead of, did we actually move the needle for the organization, for the customer? Did we achieve a return on investment? You can have a perfect project that is executed according to the best process, but if it never should have happened in the first place, then your business leaders are in their boss's office trying to fight for their job because they didn't achieve the sales goals, the marketing goals, whatever the goals are, because that project never should have been done in the first place.

0:08:34.3 LB: So there absolutely should be measurable criteria, but it goes way beyond on time, on scope, on budget. And in fact, your business leaders don't actually care about that, but they have been trained to ask the wrong questions. Instead, they should be talking to you about, and you should be asking about, "What does success look like in the eyes of the customer? What does success look like when we've done this project well, and how will we know?" It's not hard to get to these metrics. We just have to say, how will we know? What will it look like? We just had a ton a rain in Florida. Well, it was raining a lot. Is that a-quarter-of-an-inch an hour, or multiple inches an hour? How will we know what a lot is? And those questions are not that hard to ask, but the problem is we don't even ask them, the project people aren't asking them, and the business leaders aren't taking the time to tell you because they don't know that you get it, and you better.

0:09:24.9 KL: Well, this is pretty exciting to me. She threw out stakeholders and you went left, you said, okay, we're gonna have a charter first. And then she was like, "Oh no, I'm gonna go left to charter. We're gonna start at the business case." So, there we are pushing up stream, and we may not even get down to the PMBOK parts here. So Crystal, following up on scope, what is your response to that, in terms of getting the right project decided the first place, and I have a second thing in there. So, second part behind that is that our business stakeholders, to the extent that they ask anything, may have read the PMBOK and are asking the iron triangle questions, which may be the wrong questions they ask. Your thoughts.

0:10:01.3 CR: I believe that the questions come from the process. I think that's where you can get a lot... That the huge driver in asking the right questions. They provide prompts for us to be able to get at the heart of what they're looking for. The business case for a lot of us, we're not even a part of that conversation, so perhaps your argument there, Laura, is that we need to be at the table. But for a lot of us, if I can get an Amen, we're not even at that conversation of the business case. So, at least you can come prepared with having those steps in place, having those tools in place to be able to ask the questions, "Is this what your intention is for this project? Is this the scope of work that you want us to do and you have your charter to be able to provide that?" Ask that question. You have your scope statement to be able to do that. And it's not a matter that you're telling them that, "I have a scope statement and I need you to verify it," it's just that it's used for you to ask those key questions, so that you can get the answers that you want around what their expectations are around scope.

0:11:08.2 KL: Response?

0:11:08.8 LB: You wanna be an order taker or an impact driver?

0:11:12.6 KL: Oh, oh.

0:11:13.4 CR: Do not wait to be asked...

0:11:13.5 KL: Get your pens and take notes.

0:11:16.9 CR: To get a seat at the table. I'm sorry. If you want the seat, you take it, and the way you take it is by asking the questions that they haven't even thought to tell you. If you're not in the business case conversation, there is no reason you can't go say, "Why are we doing this? And here's why I need to know? Because if you wanna make sure that we actually achieve the business goals that you have set out here, I have to make sure everyone on this project knows exactly why they are here. We will make better decisions; we will get to better results for you faster. And you have to... I'm sorry. Stop waiting for permission. Go take that seat.

0:11:52.1 KL: Our steps need to start early or left of charter apparently if we're gonna have them, okay. Excellent. So now, we move on to the next knowledge area, that old school again, quality. There are a number of definitions or ways of applying the concern for quality. For example, when you look it up on the web or you look into PMBOK, you see delivering to requirements fit for use, customer satisfaction. Methodologically, we also hear quality is built into the process, it's built-in. So first, Crystal and then Laura, can you give us your take on quality from your position and how your position supports delivering even better quality or making sure we deliver to quality more often than not? Crystal.

0:12:32.3 CR: So that's where the process-based mindset from my perspective comes into play. When you know the steps and the order, it just allows you to say, "Okay, did I do this? Did I do that? Did I incorporate this?" With that said, I teach my students all the time, think about how are we making sure that we're not only in compliance with quality standards and requirements, but how are we satisfying the customer's requirements? 'Cause that's what quality is also defined as. And when you have those steps in place, 'cause I hear all the time, people say, "I just wing it," and they just, "I figure it out," but when I show them the steps and you see the processes that allows you to be more consistent, it ensures more consistency along with incorporating quality and making sure that you do indeed meet the compliance standards and satisfying the requirements.

0:13:21.3 KL: So, it sounds like regularity is part of where you're finding your quality?

0:13:25.2 CR: Yes.

0:13:28.8 KL: Laura, your response.

0:13:28.9 LB: So, you can have a project that follows every step of the process. And let's imagine, you've all been there, you've all had perfect projects. So, you've followed every step in the process, you might have even applied every step in the PMBOK, and eventually you got the project done, the old PMBOK, not the new one, which by the way, I was talking to one of the creators of

PMBOK 7 last night, Jesse Fewell, one of the people that wrote it, and he said that everyone was so mad that they didn't have... Based on the principals one that they actually created a separate project management standards process book that they've released now to satisfy all of those that were freaking out without their step-by-step instructions. So, just so you know that that's...

0:14:06.2 KL: So, I guess we can call it a day then.

[laughter]

0:14:09.8 LB: I'm just saying. But however, I just found this out last night. I was like, "Oh, Jesse, guess what I'll be talking about?" So anyway, so imagine you follow this perfect process in this perfect project, and you're all off doing that wonderful team celebration that you should do after the project was over. It was on time, it was on scope, it was on budget, you delivered every single deliverable. And your business leaders are watching you all pat yourselves on the back and have a celebration, and they're scared for their jobs. Because, when you went to them and said, "Here's how we're progressing on the project, and here's the scope we've been delivering", and they said, "Wait a minute, we have to make a change.

0:14:47.4 LB: There's been a change in our environment". And you said, "Sorry, we can't get in front of the change control board for three months, so we're just gonna have to do this as our phase one, and we'll get to that in our phase two". And your business leaders are now looking for new jobs or afraid that they're gonna have to because their butts are on the line because they didn't deliver the right project in the right way, in the right timing, because you were protecting that golden triangle and wouldn't let them make the changes. That is process at its worst, and that's what we risk when we focus process first instead of making sure that we are always aiming toward and driving toward getting to those business outcomes.

0:15:29.6 KL: I'm interested on your take, Crystal, then in response to that, around how much do we own the threatening sound, it sounded like, with the business case holders or the executives that own these investments. As you're reporting as you were saying, we can achieve quality and we can work to that quality which matters to their satisfaction. We just heard a case story scenario where perhaps they're all scrambling, trying to figure out how they can get away from this project as fast as possible. If there was a gap between success on the project delivery but not success for them, how do you close that gap, and do we actually own that?

0:16:07.3 CR: Absolutely. I think as project managers, we are now the owner of making sure that we achieve the goals and achieve the requirements. I do wanna be clear is that, yes, there are 49 project management processes but part of the quality is recognizing that, "Ain't nobody got time to do all that." There are some that makes sense over others, and that's part of the quality part to it, is figuring out what steps make the most sense so that we can achieve and take ownership of, "This is what I know makes sense for this project. This is what I know will make sense to achieve the outcomes that we're looking for." But once you are knighted as that project manager, you own that baby, and now you have a framework to prompt you to ask the right questions, you have a framework to keep things in order, and you have a framework to keep your sanity, quite honestly. 'Cause if I just do things on a principal basis, it feels like the feels, as opposed to, "I know what you want. Let me execute it to the best of my ability and making sure that you are getting what you are asking for stakeholder." You don't own the project, and you have to stop taking the accountability that belongs on your business leaders. You facilitate that project delivery, but you don't own it. And

that's the problem, is that we are...

0:17:36.7 CR: I remember being inside organizations setting up PMOs and I would go talk to all the sponsors, and I would realize the program managers, when they had to go talk to the sponsors, were scared to death. They would sit at the end of the table, and the sponsor would say, "What are you gonna do to fix all these problems, program manager?" and I went in there and said, "Uh-huh, you need to ask a different question. How might I help? How might we solve this problem together?" Shout out to Mike for the How Might We. How might we get to a better result? Where can I help? But if you take ownership of that project, then you are taking away their responsibility to ensure that it's delivered the right way. You're letting them off the hook. You don't own those decisions. You shouldn't be saying, "No, we can't do this because of the triple constraint." You should be saying, "Yes, absolutely, and here's what that will take. Would you like to proceed knowing the consequences and being responsible for them?" So we can't own it. We are facilitators of the process, and if we stay in our lane, we get engaged sponsors and keep engaged sponsors because they're accountable for the outcomes.

0:18:43.0 KL: Well, already seen the staked-out positions here, the order taker versus feels the feels. So, I think we're up and running. Laura the next one will be for you to open, I wanna hear your thoughts on the following, which I actually believe, I'm not sure that I got this phrase from Mr. Bill Brantley, who's been a moderator of great success here this morning and this afternoon, who made the following, "What are your thoughts on the resident repository of things that freak us out? Also known as the risk register and risk, I'm talking risk baby, resident repository of things that freak is out. So, there we go. The risk register and repository. How do you see your natural inclinations to approach... Particularly from a PMO perspective, I know that you've also worked with that right, quite a bit, just a little bit. And I don't mean for a certification test, how do we need to be thinking about risk from the principal position that you're taking?

0:19:37.2 LB: Sure.

0:19:38.4 KL: Laura?

0:19:39.0 LB: It's an excellent facilitator of asking better questions, right? A risk register is not meant to be something that we check the box in our process that we had a conversation about risk six months ago, we put it on the shelf and we don't ever talk about it again. It should be a part of the ongoing dialogue of how are we going to solve the problems that will present themselves? How are we gonna take advantage of opportunities that come at us? And how are we going to best prepare to get to the right business outcomes for this project? It's a tool, I said it, it's a time we can use to facilitate better conversations. The problem we have is that we are treating it like a step in a process, instead of thinking like business leaders, which is what your business leaders are begging you for, they want you to think like a business leader, think like them, and help them think through the challenges that could present themselves, the opportunities that could present themselves. If you treat the risk process as a mechanism for having better conversations and thinking and acting like a business leader, it can be used for good, it can be used to be helpful.

0:20:47.5 LB: The problem we have is that when we have process first approach, we are thinking about checking the box, we're going through our list, "What must I do next? Instead of getting up and out and looking around you and saying, "What better conversations should we be having, so, that we can stay aligned with the business goals, not just the steps in our process?"

0:21:10.7 KL: Crystal, your take.

0:21:12.6 CR: So, when you create that charter, you're having a high conversation about risk. And risk, every time you have a conversation with your stakeholders, so the step piece of it is knowing that, make sure you think about... And I love the shout out about... People do get scared about a risk conversation, and I think a great way to modify the question is, "How might we address this?" So, even we can take ideas from the principles but still apply it towards the process way of approaching our risk management. I think with the risk register, I just taught a course on that earlier this week, and people were just absolutely in awe about the fact that if I just stop for a moment to think about the what ifs. What could go wrong, what could go right? And even if someone's like, Oh, I do that, but everyone feels like I doubt what they're doing, set it aside is just a step in terms of a 90-minute to two-hour conversation, let's just talk about the risks in our projects.

0:22:16.8 CR: Good, bad, ugly. And sometimes it has to be something that you do force as a step in the way of getting to the goals of your project. But, I see that some level of just adding some level structure is extraordinarily helpful. Look, the global jobs report from PMI says that 23 million project jobs are gonna be needed in 2030 because of retirement. Nobody has time to teach people principles, so if you teach them process first, so they understand how to ask the right questions, give them time to get to the principles and have the courage to step in a room and say, "I need to be a part of the business case". Young early careers don't have that clout, just yet to be able to do that. And I think it's at least given them a structure to be able to ask the right questions, and I think that's where I'm coming from that approach. What I hear over here sounds great, if I have 10, 15 years, I burst in that room absolutely, but you're not gonna be able to get that person that's brand new into the field and they need at least a structure to show consistency in their work, and then they will have the courage to be able to do that and have those conversations.

0:23:33.5 KL: Well, I heard both of wanting to make sure that we ask questions, and both of it was about asking the great questions and getting it. I wasn't sure who we were forcing there, you said sometimes we have to force the conversation, which is a little different than facilitated conversation, I think. But is there something that you wanna follow up with the force, is that because of resistance?

0:23:50.8 CR: I think it's still how you say it, it's not what you say, but how you say it, and not everybody's very well-versed in the EQ perspective of things. So, I think it's just using those skill sets around diplomacy and negotiations, and quite honestly, the office politics, know who the power players are, who will back you up. And if you show at least a level of consistency in your work around having a structure in place, I think that will give you the clout to be able to step up and step out in a room to say, "I'd like to be a part of this", as opposed to saying, "I need to be in this conversation". You can still ask the questions, but if you have a framework to give you the guidelines, I think that can be a tremendous help for you.

0:24:35.3 KL: Something that I have been wondering about that you're both right up next to some of the assets around the risk piece, it seems to imply as a project manager from both these directions, whether you're leading with I need a structure or the key is to understand your risk tools are tools for facilitating better questions explicitly around that. I have often wondered then, do I need a risk manager, both of you, in my mind are implying this is an element of my project management role, which we know in part it is, is it a matter of scale, or at what condition do I need

someone named? I have been on projects with an entire risk team, do we advocate that role to a team, is it important for one team to be the ones who ask the hard questions, Why do I need a risk manager anymore if we're taking this approach?

0:25:23.5 LB: So, it's like saying that change management belongs to some other department over there, that's gonna be responsible for making sure everyone is in compliance with this change. Organizational change management, risk management, these are skill sets, not roles, and the reason I believe that is because you are responsible for being a business leader, solving business problems, not project problems. And so, when we over-process things, well, we have to have the change department over here, and they're the only ones that interact with the people and tell them what's gonna change and why they should care, or the risk people over here, and they're the only ones having conversations about risk, that's why we have so many projects that just fall flat. It's the responsibility of the project people to understand the full landscape and get up and out of their particular box checking role and become the business leader, your business leaders are looking for as a partner by asking good questions, if risk management belongs to one department then nobody else is thinking about it, nobody else is asking those good questions, and every project manager in this room and every...

0:26:31.7 KL: Person on your projects, should be asking questions, about how do we ensure every day that we are avoiding the things or going to accept the things, or we're going to ensure that we accelerate getting to the things that are gonna change this project for how it needs to be changed? So, it's a conversation everyone should be having, it doesn't belong in a separate department, just like none of those other skills belong in individual departments, because then we're taking away the ability for everyone to feel its responsibility to ensure the business outcomes of that project.

0:27:06.4 LB: Everyone should be talking about risk, everyone should be talking about bringing people through change, and I would go so far as to say, it's a nonsense that you have to be senior in order to ask good questions. My 15-year-old asks fantastic questions and drives me crazy with the good questions he's asking all the time, he doesn't need to follow a process. He's just inquisitive. I think everybody... You, Kendall, your kids are like that too, I think that it's not age-based. So, the challenge we have is that when we try and segregate and process first focus, we are advocating the responsibility of being able to ask better questions. Look at the whole picture, your business leaders are looking for you to be a partner, but you cannot be their partner when you're shoving PM speak at them, you can be their partner by helping them solve their business problems. Risk is a great way to do that, have good conversations with people.

0:28:00.9 KL: And brief then, and actually Crystal there. How do you see the blend risk management is a skill versus risk management as a role?

0:28:07.8 CR: It's a skill. I do agree with that, it's a skill.

0:28:09.9 KL: You agree on that.

0:28:10.0 CR: I do though believe that the more complex your project is, the more better off you're having a subject matter expert. So, one of the heart-breaking things when they went to seventh edition is in the process group practice guide, I'm like, "Where are the knowledge areas? 'Cause those are the key.

0:28:31.9 LB: Those are the keys.

0:28:32.4 CR: Right. There are some key pieces, and what I always explain to folks when I teach these concepts is that with the knowledge area thinking, it allows you to see all kind of the parameters and all the features of a project that could impact your work and know enough to be dangerous. So, it is my responsibility as the project manager, but I can't do all those things, I can't be a good project manager, a good risk manager, a good quality manager, the larger this project is. So, at least when you have an understanding of those different terrains, you know how to delegate, or at least tap into those subject matter experts, delegate, facilitate, whatever it is that you want. But know enough to ask them because they're the experts. And I know that my focus is on making sure that I get the project to completion, meeting the requirements and satisfying the customer's requirements as well, and I think that's just the focus. But I never advocate for speaking PMBOK language, I always say if someone's talking PMBOK, you need to take them aside. 'Cause that's not the language of your business.

0:29:37.2 CR: Okay, I just wanna be real, that is not the language of your business. So, it's having that internal... But it's just like when you talk to anybody from a different culture or different business, talk their language, but apply it so that you can be consistent in your work.

0:29:54.6 KL: I would like to resolve something that I have wrestled with personally as a project manager and as a team member as well. It is not uncommon to hear, it is very common to hear that project management is 90% communication, and I have a sense that this ties often to EQ, this ties to the need to talk to any number of stakeholders and team members. However, in recognizing the exchange in PMBOK 7, when you start to look at the communications area, they're always outlining the things like building your library, your index, your meta detail, your reporting structure and templates. I know Laura, that coming from a PMO, you have templates involved in communication. So, everybody needs to know, you may be principled, but we do have templates and steps. So, communication, I'm just curious from where you two stand, I always hear, "Oh, it's all about the communication", but then everything we learn in steps doesn't seem to speak to that directly to me. How would you address communication, what do we really need to know as project managers?

0:30:54.4 LB: It is most of the job, if you're doing it well, because your role is actually to be a facilitator of change, your role is to bring people with you through the change process to do change with people and through people, not to people. And that is a big shift. Most, if any of you have had to sell the PMO or cell project management, you're doing it wrong, because when you do it right, when you shift the focus from, "But wait, this process is exactly what you need, and instead focus on giving them what they want first, you'll get a chance to give them what they need". Always give them what they want before you ever start trying to give them what they need. They don't care about what they need, they care about what they want, what they want is to solve the business problem that is going to get them their next promotion, what they want is to work like less hours so they can get to their kid's soccer game. That's what they actually want.

0:31:56.3 LB: And you're only gonna know that if you're asking the right questions and facilitating the right conversations and putting the onus back on the people where it belongs to own the project and own the results of that project. So, it is very much about communication, but as we've been saying, or as I've been saying this whole time, it's about the right questions, the right conversation, and bringing people with you on that journey, 'cause really it's actually about organizational change management and doing that change through people. The only way to do that though, is through

communication, but it's gotta be the right communication, stop selling project management to people, nobody cares, but the people in this room, and we do, we love it and we get going on it, but the business leaders actually care about something different, and the more you can elevate your communication with them and have a better conversation with them.

0:32:46.9 LB: The faster you're going to be able to get them to take ownership and to come back to you and say, "Wow, that was great. Can you help me with the next thing?" And then it becomes a pull from them, instead of you pushing, you'll start to feel them pulling you closer, pulling you into their inner circle, pulling you into their conversations because you become a trusted advisor that gave them what they wanted instead of what they needed, that comes later.

0:33:15.7 KL: So, she's swinging for the feels on that one again, ask the right questions. So, let's take it as granted that when we ask questions, they'll be the right questions. But I'm still wanting... Oh, Crystal, I want you to let us off the hook here. Here's why? 90% communication, so how many templates do I have to design to make sure the team has properly filed all of its reports and its structuring requirements well, and all of the many things that seem to fall out in the process approach to communication? How do you approach it from your perspective?

0:33:43.9 CR: It's about giving the right information to the right people, at the right time, in the right format. Just because you like sending an email doesn't mean they're going to read it. It's about making sure that you are asking them, "What are your needs?" And maybe going a step further and asking,"How do you like to be best communicated with?" And that's where I think about that from a process orientation. "What's going to meet their communication and information needs?" I have been told by a stakeholder, "Crystal, you're not important enough to read your emails." After I picked up my ego off the floor, I said, "You need to be a part of this conversation. What's the best way to get this to you?" That wouldn't have happened if I didn't stop and think about, "How do I make sure I tackle what their needs are?" And I think with communications, it's everything from catching them in the hallway. And she ended up telling me, "Come to my office. Set up a meeting at 8:30 in the morning, set it up with my assistant." I didn't like the idea, but if that was the way to get the information to her, that's the way that it needed to be done. And if I waited later to hope that they're gonna read my emails, I would've found out she was disengaged and she wasn't reading my emails flat out.

0:35:04.3 CR: So, just having the process orientation in my head, not telling her, "Hey, I'm doing communications management right now," but just having that thought process allowed me to be a little bit more intentional about asking what her communication needs are. Everything from the kickoff meeting conversation. "Hey folks, my number one way of communicating is email. Let me know if you're not going to respond." And people are shocked when I actually asked that question 'cause they pulled me aside and said, "Thank you. I'm not gonna read your emails."

[laughter]

0:35:35.3 CR: So, how do I get that information to you? But it is being... Just having that process thinking allows them to be a lot more methodical in asking the questions and finding out what their needs are. And it may not be all these reports that I need to create, but I'll find out when they're like, "I don't know what's going on." That's where I'm like, "Oh, maybe I need to create this document for them." "Who's on point to do what?" That's where I'm gonna create a RACI chart. But I might not do it upfront, but at least it allows me to figure out when balls drop, "Hey, maybe I need to

implement this to get them back in line with the information needs."

0:36:15.0 KL: I wanna hold that thought for a second. I'm gonna turn over here. Are y'all taking notes? I'm hoping you're taking notes and I hope you're thinking of some questions to ask. We're a little bit over halfway through. Okay.

0:36:25.0 LB: What she just explained was using common sense. It didn't require a process.

[laughter]

0:36:31.3 KL: I heard tale that common sense isn't that common, but just saying.

0:36:34.0 LB: Well, then put common sense into common practice. And that's the process you follow. Knowledge area 14.

[laughter]

0:36:42.0 KL: I heard a be motivational speaker speak on the excellence in project management. And he posited that we often find that there are interrupts. When we have interrupts, there are two typical attitudes that we approach at, we come at this. One is, "Oh, there's always some damn thing happening". It's one thing after another. And the other one is, "I live for the madness. So it's adaptability versus anti-fragile and it's felt like that kind of aligned to these two different positions, both that might get us there. So, should we be looking to structure responses? This is back to risk in a bit. Structure responses to crisis preemptively or should we even be bothering to look for crisis because we're just gonna live for them? Who would like to take that one? Resilience or anti-fragile.

0:37:27.5 LB: The reason I am principles-focused first is that I'm pretty sure that the people in this room wanna be left alone to do good work instead of being told what to do all the time. And that means that you just need some guardrails. You don't need to have everything so prescriptive for you with a checklist that you must follow. You might need a different process to get to a different outcome, but if you don't know the outcome, you're going to follow one way of doing things. So, the reason I bring that up here is that you need to be able to be nimble, flexible, adaptive, and respond to the world that is changing around us every day. A lot of us have seen a lot of really big change. We've had the carpet pulled out from under us on a project, companies have disappeared overnight, market changes happen. All the time we have challenges that we need to be able to respond to. And if we are in a constant firefighting mode and just waiting for the fire to happen and then pulling out a process for how we're gonna respond to it, we don't have the flexibility to be in the moment, see it coming, and be a fire preventer instead.

0:38:43.6 LB: We want to be a world of fire preventers, and I know, some of you are like, "No, but really, I really like the firefighting. It's kind of fun." And it is. Because some of us are really darn good at it. I get it. And some of you are actually fire starters. And it's because you are waiting for... You're following process to a point that it is preventing you from using common sense. Guiding principles and a principles-first approach give you the flexibility to look ahead, see what's coming, not ask for permission, and figure out how to solve it. Before starting my company 10 years ago, I had, I built PMOs for 15 years, strategy delivery teams, transformation teams. And the people that were the highest performers on my team did not have their PMP. And I had a hard time getting them to get it, because they said, "I'm gonna use common sense and I need you to give me the

freedom to go solve my customer's problems and make sure that we achieve the business results." It's not all about waiting for it to happen, in fact, the process-first approach sets you up for having to fight the fires. And instead, when you give people a framework and guardrails to work within guiding principles, they can be... You all are very smart people. The people in this room are highly intelligent, I would love to give you the freedom to go figure out the best way to solve that problem regardless of what the process is.

0:40:14.6 KL: What extent would you use process to handle this from an anti-fragile perspective? She's implying that process is structure and that makes you fragile, it makes something to break.

0:40:22.5 CR: Yeah, this is where I do definitely see a difference in opinion with it, because of the dynamic nature of our world, the process orientation allows us to be on the same language and the same page. So, like in process, do you mean this? And then I can figure out how to tackle it. So, I think it really sets you in a position when you're process-oriented to say, okay, here's all the craziness that's going. Where can I pin point in my head, I'm not talking to the stakeholder now, I'm not saying, "Wait a second, you're talking scope management, right?" That's not what I'm saying. What I'm saying is that when they talk about, "Hey, I just came back from this great conference, I wanna add to the work, we should do this." And you're thinking to yourself, I wanna support them. Here's how I can support them by thinking about how this is going to impact our timeline, our budget, are they okay with us being behind schedule if they wanna add this piece, and it's great. If we're on traditional projects, we do have to account for that.

0:41:22.3 CR: If we're on more agile projects, this might be where we have more flexibility and can streamline, but it allows me to think about how I can apply this piece of the puzzle in all the craziness of our worlds. So, I think it actually can help you rather than put you in the stagnant position of, "Wait, we can't do that". But it gives me just something, just a tool box, that's really what it is. It's not that I have to do it in this order, 'cause we all know it just flows, but it's, let me grab this and see how I can use this to meet their needs.

0:41:57.2 KL: Thank you. I'm gonna give us a little instruction or direction here, I'm gonna ask two questions around teams, and I'm gonna invite John to go ahead and get his group ready, anyone who's supporting for pulling up some questions, we're gonna have two questions on teams and now it's 11 minutes and then we'll have some questions. And then I'll have one last short question for you and let you close. Okay. So, with that, team motivation, I'd found that this does not exist a lot in the literature, the way I have seen it. Team motivation, so when you look at team management, I'm talking about how we get people to have positive emotional response and willingness to work. How do you approach that from your type of position, the way you see teams, this feels very much in the feels perspective, but all of us as project managers are in some portion of this, or do we? If it's not the PM, where does that exist? How do we get to positive motivational work with our teams?

0:42:52.2 CR: I think that's a fair question about who has ownership in it and I feel a sense of responsibility as a project manager. Do I necessarily say that I own that? I'll take responsibility for it. And thinking about how do I make sure I motivate them? I had a boss that asked me one day, in the DC area, you get the question, what do you do for a living? And he asked me, "What do you say when people ask you that?" And he caught me on a bad day, can you believe me on bad day? And I said, "I do PowerPoint and Excel all day." And he said, "Crystal, I am so sorry that you respond that way. Because I realized that when you were on board on this project, I didn't get to explain how critical you are in making sure that we need the President's budget so that we can continue to

provide healthcare services to our veterans who've served us. And you matter, this project work matters." And he took that responsibility to really instill in me, the mission and vision of this project, and he had me saying, I do a lot, I do great stuff on this project, and that's where we come in as project managers.

0:44:00.9 CR: And that's where when we... I don't know if a process can really answer that, but what I do like about teaching to the processes is that we get to talk about each one of the key elements of having emotional intelligence, recognizing that your team members are not always going to be at their best, and how do you get them from being stuck and frustrated? And that's where... It's not gonna be like, wait, let me pull out EQ. But it is thinking about, you know what, I do have some sense of ownership that my people, my team members, they come with stuff, they come with emotions and opinions, they're people, they're human beings. And from a responsibility standpoint, if we want them to shine, take a little bit of that perspective of helping them and how might I help you be at your best, and that's really my stuff, I wouldn't say it's principles, I wouldn't say it's process, I would say it's people.

0:44:58.3 KL: Laura, your take on the motivational aspect of the team, who owns it, and how do we do it, how do you approach it?

0:45:06.0 LB: People are, and you may not believe this with some of the people you work with, but people want to do good work, they want to be a part of something meaningful, they want to have purpose in their work. It makes it easy, easier for you to ask them to do hard things when they understand the mission, they understand why they're there, and they understand how important and integral they are in achieving the outcomes. In this very room, multiple times we have held the Project Management Day of Service events, anyone familiar with Project Management Day of Service? Okay, Beth, it looks like you've got a lot of recruits in here for the next one, don't worry, it's in this room next year. So, at these events, project managers come together and they help non-profits address and set up for success, a mission-critical project.

0:46:01.4 LB: The very first thing that happens when these project managers get around the table with this non-profit leader is they ask them about their mission, they ask them of what they are there to address, that non-profit leader says, "We are housing the homeless, we are feeding children, we are making sure that battered abused women and children have a safe place to go, we are ensuring clean drinking water for everyone." That is the very first conversation that happens with those project managers. Before any process happens, everyone at that table knows exactly why they are there, and then they all roll up their sleeves and magic happens. But first, everyone knows why they're there, what the business problem is they need to solve, 'cause that non-profit leader says, "I'm stuck here. Can you help?"

0:46:51.9 LB: And they don't pull out the PMBOK. And they don't pull out a bunch of process, in fact, it's run very, very lean with the focus on, "We're gonna do whatever it takes to get success for you today". For some people, they're flip charting, for some people they're pulling up a spreadsheet, others they're just writing on whatever they can find, but what that team does is 'cause they're smart people that are super clear on how they are going to affect real change with real people. And immediately they go to action and you can walk from table to table, and you'll see them doing very different processes, but those non-profit leaders at the end of the day are in tears, the project managers also in tears, warning, you might cry. But why are they crying? Because many of those project managers will tell you, it was the most meaningful day they have ever had as a project

manager, because they were a part of something bigger than a process, they were a part of helping to ensure that real change happens in this world. They had purpose, they had meaning, the why was super clear.

0:48:01.2 LB: So, when we think about teams, it's everybody's responsibility, in my opinion, but it starts... How, Kendall the question you asked was, "How do you do it?" How you do it is by getting very clear on why this matters and how they are a part, the people doing this work are a part of something important, and all of you should be signing up for Project Management Day of Service next year.

0:48:21.7 KL: Let me take this in. We talked a little bit about risk and we talked a little about teams and positive, let's talk about the thing that the various serially voiced at the podium of Project Management motivational speakers, which is, what do we do, for those of us that have faced this, with poor individual team performance? What do we do when the humans go wrong? It's always good when it's fun, and it's effective, what happens when it goes bad? Not all performances are equal, how does your viewpoint address or correct or mitigate poor team performance?

0:48:53.7 CR: It's the same thing that we've been saying, it's about the questions, tell me what I can do to help you in meeting this deadline. Using those various reports that if you decide to create it, what happened? How can I help you? So, it's not a matter of you missed this deadline, but using it to have a human conversation about, "I noticed that there's slippage, how can I help you get back to it?" Or "What resources do you need?" So, I think from that process standpoint, that can give you some set of guidelines to remove sometimes the emotion and not necessarily saying the right things, but get down to the facts of it, and that is something that I do stress about using a work performance report. That helps you remove the emotion about what's wrong with you, but say instead, "Hey, I've noticed that we're not meeting this deadline, this is what the report is saying, How can I help you meet this deadline?" So, I think that's where it has some value.

0:49:46.0 KL: Thank you, Laura.

0:49:48.4 LB: The most important question that you need to ask is why, because it's very possible that what you see as poor performance on that project is because their boss put 15 other projects on them and told them that they were more important. We have to actually understand what's going on with that person. When you hit resistance, it's usually fear, fear of change, fear of whatever is happening to... What's gonna happen to them, or not understanding how the work they're doing is connected to something that they care about. So, everyone know what the WIIFM is? What's in it for me? That, when you start with why and determine what they actually care about and figure out how to connect what they do care about to the results you need to achieve, you can virtually eliminate that kind of poor performance, but it starts with asking a really good question.

0:50:44.0 KL: We're hearing some similar answers to all of these. Excellent. I was gonna ask about change, but we're running out of time, and I know people wanna get some questions in here, did we have some people with some questions? Okay, let's get him on the microphone.

0:50:54.5 Audience: This question is more for Laura, but I'd also like to hear Crystal's answer as well. You mentioned several times, things, freedom to do our work at risk management, change management is a skill, not a position, job's position, but then you also have said things like, stay in our lane for stakeholder accountability, that we don't own the project, where do you draw that line

of it's them, or it's not an us versus them mentality, but where do you draw that line of their wheelhouse versus our wheelhouse?

0:51:24.4 LB: Okay. Very clearly. And that sponsor, that key stakeholder that is responsible for the success of the project, which by the way, may not actually be the sponsor that's on the charter, so, that's an important thing to figure out, who really cares about this project getting done? They're the ones that are accountable for the project delivery. But when I say stay in your lane, it's about what decisions you own, you don't actually own decisions about the triple constraint, you should be presenting information for your business leaders and have the skills to talk them through getting to the right answer, but you have to be able to talk about risk, you have to be able to bring them through the change, you have to be able to have all of those kinds of conversations. Those are the skills, but when it comes to who owns that project, it's not the project manager, we're letting business leaders off the hook by thinking we own the project, because then they go off and they ignore you and they want the elevator update going from one floor to the next, and they're like, "Okay, see you. Bye." Instead, they need to be involved in that conversation, and if you are better at business speak, risk management, some of these other skills we've talked about, you will know how to have better conversations with your business leaders.

0:52:41.7 LB: Oh, by the way, do you have the WIIFM for your business leaders and your sponsor? Do you know what they really care about? Do you know what's gonna put them in the position to get their next promotion? We've got to ask really good questions and then stop talking.

0:52:57.5 KL: Crystal?

0:52:58.1 CR: I count on that too as well, is that, stay in your lane but be a part of the business case conversation, but don't take this role on. I do... I'm gonna stand pretty firmly about the ownership of the project to meet the outcome, so still outcome space, but that's where the processes can help you in figuring out who do you need to tap into from a subject matter expertise. That's where a process orientation can help you just know how to ask the right questions of the key people. And I do believe there is a partnership that should be a part of this, but it's not... And it's my ownership as the project manager to make sure that we're meeting the outcomes. Those outputs do need to have the outcomes that we're looking for, and that's my expertise from that project management standpoint. So, I hope it does answer your question.

0:53:46.5 KL: Thank you. It was a really good question. I appreciate that.

0:53:48.4 KL: Our first question from online, what happens when management doesn't view project managers as business leaders and may or may not want to share those responsibilities?

0:54:00.4 LB: We don't wait for that, right? You've got to stop waiting for permission to act like a business leader. And we're not trying to get them to share responsibilities, we're asking better questions, and instead of shoving PM Speak at them we're asking them questions about the business results they're trying to drive. And when you do that, we have a mastermind group of PMO leaders and project leaders from around the world, and every single one of them that has started having different conversations with their business leaders has become a trusted advisor, has gotten a seat at the table, has been the first one that they ask, "Hey, is this doable? Do you think we can do this?" It's okay to have project management knowledge, it's the questions you're asking them to show them that you understand the business problem that needs to be solved. So, we don't need to wait for

permission. That's the problem we have, is that so many of you have been taught that you have to wait for permission to be a business leader. Step into it. Show them the value you bring to the table beyond templates, tools, and process, and methodology.

0:55:02.7 KL: Crystal, I just heard kind of a role versus function again comment there. What's your take to the listener's question?

0:55:09.4 CR: I think you show them consistency. I think you show them that you're still going to deliver and you're still showing that I'm not gonna let that get in the way. I think that's where I see it as a little bit of getting outside of our lane, if we try to do... If that's how they feel. Sometimes I do need to be, "Is this the hill I wanna die on today?" But if I show them diplomacy, consistency in my work, I win them over. That's how... That's just where kind of my stance is with that. Or I update my resume.

[laughter]

0:55:43.5 KL: Consistency or resume. There we go. I'll take one more question from the floor. Do we have one?

0:55:48.9 Audience: Hello. And my question for you is, is that in your approach to project manager, you're pretty much getting into areas that are not traditionally involved in project management. And the role that you seem to be advocating for is more on the lines of a chief project officer who's up on the same level with the chief financial officer and the chief executive officer and the chief operating officer. Because you have to be in a position where you're gonna do things without necessarily asking for permission or you may be one looking for another job.

0:56:22.3 LB: Anybody can ask good questions. You don't need permission to ask questions. You don't automatically get your seat at the table, you earn it by them seeing that you can ask better questions. You get there faster, I did this in my career, I have a computer science degree. I fell into project management accidentally because nobody else would grab the white board marker and go up to the whiteboard and say, "How might we solve this." And then fell into PMOs. I didn't get trained on it. I didn't have a process. I had to figure it out by asking good questions. So, I certainly did it. And we have people all over the world doing it. You're not breaking rules, you're just being curious. There's a difference between... And it's not just, that's the problem, everyone, you... It's not just for the C-suite. And smart people in the C-suite are looking in the organization for the people, I know this because I work with a lot of C-suite executives. They're looking for you. They're looking for the stand out that is going to be curious, that is going to be innovative, that's gonna push the boundary a little. Yes, even in the government space.

0:57:33.1 LB: They are looking for the people that are going to think and solve business problems, not just wait for permission or take people through a process. So, anyone can do this. And if you are truly in an organization where you will be fired for asking a question, is that really the life you want?

0:57:51.6 KL: So, with that we will move to our 30-second closing comments. Crystal, you got to open today, so Laura, 30 seconds. Tell us the answers.

0:58:00.6 LB: I believe wholeheartedly, and that's why we started Project Management for Change

so many years ago, that there is no other profession more capable and more prepared and more skilled to lead our world into a better future. You are the people that make the magic happen. And I wholeheartedly, believe that you have what you need without a certification, without a process, you just need some guard rails, which means you need to find good business leaders to mentor you and show you the way, because we are the future. Every one of you in this room is the future, and we need you to be business leaders and step into business leadership, not just project management.

0:58:46.0 KL: Crystal, you wanna close this out?

0:58:48.8 CR: Absolutely. I believe that the process focus allows you to have those guard rails. Our business leaders aren't always good at doing that, and they also don't know always what they want. The process orientation just allows you to have some type of structure and framework so that you know how to get at the heart of what they're looking for and what their needs and wants are. It allows you to take that ownership around managing your project effectively so that you can consistently deliver and show them how you shine. So, I think that it's not about using all the processes, it's not about using project management speak, it's about using it so that you know how to have that framework and structure to deliver the outcomes.

0:59:31.9 KL: Thank you, I give you Crystal Richards and Laura Barnard, thank you very much, both of you.

0:59:35.5 CR: Thank y'all.

[applause]

0:59:42.3 KL: So, that's a wrap. And the answer was both. In fact, this was hard to determine in this episode, was it a ways of working or a business acumen PDU. It's hard to tell. But we're gonna go with business acumen, as both of our experts concluded that for PMs communications is so important and they landed in the same place together. Crystal encouraging us to talk the language of the business, even as we structure communications for consistency. And Laura reminding us that understanding the business landscape, which comes from asking good questions of the executives and stakeholders was key. Thanks to both Crystal and Laura for the engaging dialogue. PMPs, if you've listened to this whole debate, go run the PDU process machine at PMI's PDU Reporting Center, selecting online or digital media and manually enter, the provided code number 4634 and select empowered strategies. And the name of the episode, which is PMPOV0110 PM Faceoff Process vs Principle, and select business acumen in the new talent triangle. I am your host and debate moderator, Kendall Lott, inviting you to tell me a topic you would like me and Mike to cover. And in the meantime, get smart on the business, keep it in scope and get it done.

1:01:00.6 Announcer: This has been a Final Milestone Production sponsored by Empower Strategies. Final Milestone.