

Welcome to

Project Leadership Essentials

Developed for

Sandia National Laboratories

Designed and Delivered by

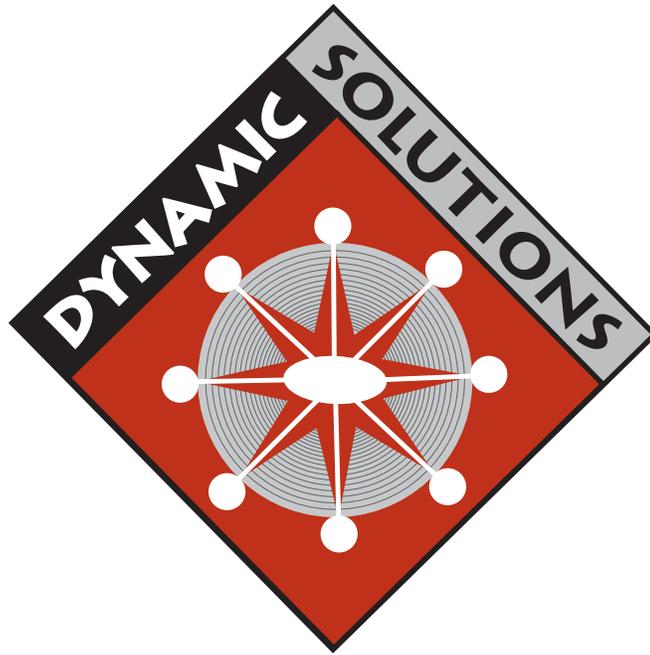
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Revision 1.0

Project Leadership Essentials

Your Name

Your Trainer

Course Dates



About Susan Junda of Dynamic Solutions

MBA, PMP, Consultant, Facilitator, Trainer, Ontological Coach

Susan Junda is the President of Dynamic Solutions, a training, coaching and consulting company which helps companies better utilize their people to create extra-ordinary business results.

With over 20 years of service in facilitating teams from both the project management and team dynamic perspective, Susan's passion and forte is to assist others, whether individually or in teams, discover their true nature or purpose, transcend limited thinking and generate extraordinary possibilities for the future.

Susan travels nationally and internationally, consulting with and training clients in the areas of strategic planning, project management and team development. She has worked with over 500 teams, training them to use the tools of project management to develop viable project plans within the team environment. The focus of this work has been in research and development, engineering, IT, manufacturing, healthcare, biotechnology, and transportation/construction industries. She also works with groups to do strategic planning, organization culture change and team development.

When not working with clients, Susan is a seminar leader for the American Management Association, teaching public and on-site sessions in project management and team development. She is a certified facilitator of the Team Spirit program developed by Barry Heermann, Executive Director of the Expanded Learning Institute, of Trustworks® (a Ken Blanchard program) and is a graduate of Newfield Ontological Coach Training program.

Before starting Dynamic Solutions, Susan worked in commercial industry and government subcontract sectors for 17 years for corporations including Digital Equipment Corporation, Ford Aerospace & Communications and Lockheed Electronics. In her last 7 years in industry, she was a project manager in a hardware engineering and manufacturing new products environment, managing up to five cross-functional teams of people at a time.

Susan holds an MBA in Management and Organization Behavior from the University of Colorado and a B.S. in both Industrial Relations and Decision Science & Computers from Rider University, holds the PMP designation (Project Management Professional) from the Project Management Institute, and is a member of PMI and the local chapters of ATD (Association of Talent Development), and ICF (International Coaching Federation). She currently resides in Albuquerque, New Mexico.

The facilitations, workshops and speaking engagements Susan delivers are dynamic and interactive as she incorporates many real life experiences into her material, not only from the corporate world, but from her personal life and learnings. She brings a passion to her work and creates a passion in others to grow and learn as well.

Course Concept

The course purpose is to teach project managers to utilize creative leadership, communication and negotiation skills in order to build team commitment and ensure more project successes. In becoming skilled in these areas through knowledge, tools and techniques, a project manager will more predictably assess time and cost, and communicate and negotiate more effectively with everyone surrounding the project — managers, team members, stakeholders, clients. In doing so, unexpected “hiccups” in project execution can be minimized, if not eliminated, thus creating more project successes. The core competencies that a project manager gains in this course will help in managing any type of team, in any project phase, in any industry.

In today’s business climate in which most companies struggle to remain competitive, the best thing a project manager can do is to work on the “right” project and then bring it in on time, within budget, in a way that meets expected results. Going beyond basic planning, super heroics and force, threats and coercion, this course instead focuses on utilizing the project’s most important resource — **THE TEAM** — and the project manager’s skill set, in making this happen.

In the fast paced business world, many project managers are ready to “go to the next level” in how they manage their projects and teams. While they know the basics of project management, many of them are tired of working too hard themselves and coercing their team members to perform. They are also weary of being yanked around by stakeholders’ constant changes to the project scope. In learning how to build commitment through enhancing their leadership, communication and negotiation skills, class participants can return to work with new tools, skills and behaviors that will enable them to truly enjoy being a successful project manager.

Course Objectives

After completing this course, participants will have increased competency to:

- Build a high performing team and create commitment to assist team in meeting its deadlines.
- Communicate more clearly within the project environment, including giving and receiving of constructive feedback.
- Delegate more successfully as a Project Manager.
- Facilitate effective meetings, including presenting an options paper to get the team or stakeholders to make a decision.
- Manage various types of communications throughout the project life cycle.
- Resolve conflicts to keep team committed and on track.
- Negotiate more effectively, using various influencing styles.

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Module 1

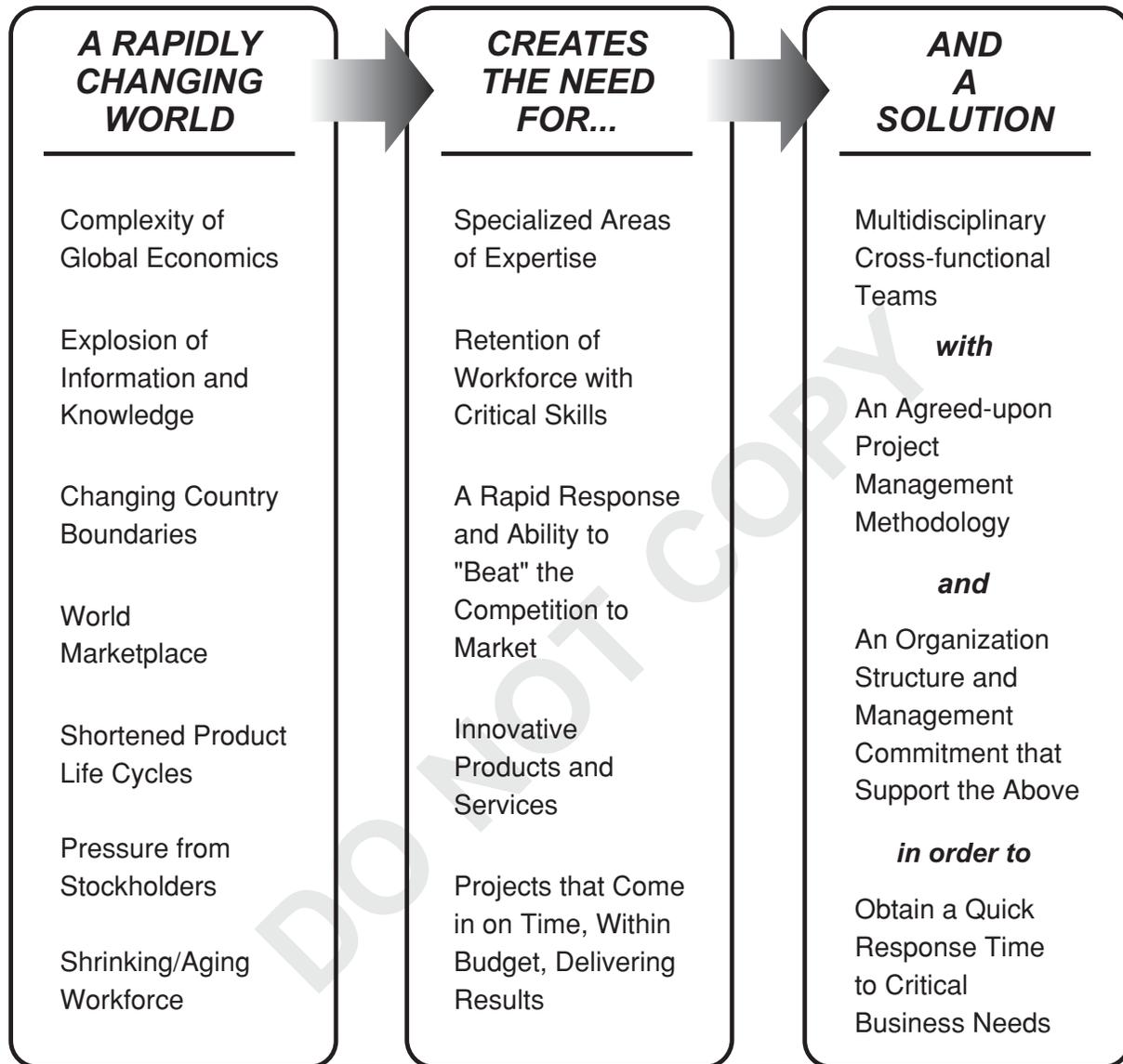
Leading in Today's Project Environment

Learning Objectives

At the end of this module, you will be better able to:

- Understand the need for project management and how its application has changed over the years.
- Define what project success, high commitment and superior communication mean and how they relate in your world.
- Identify the key leadership skills and strategies needed by a project manager and assess your own capabilities.

Why the Need for Project Management?



Traditional vs. "New" Project Management

	INDUSTRIAL AGE ~1900-1970	INFORMATION AGE ~1970-today
Organization Structure	Hierarchical, vertical lines of communication	Matrix, Project Mgt. dept., horizontal lines of communication
Key Operating Element	Power "over" others	Learning and knowledge of the people
Management	Top down, command and control	Empower others; self-directed teams
People	The "doers" - work separately, in narrowly defined and mutually-exclusive areas of responsibility	Used to develop innovative business solutions, project plans; areas of expertise
The Work	High volume, standardized production	Use of multiple functions simultaneously through teams; determine interdependencies
Goal	Specialization of functional skills	Better use of resources to achieve business goals
Primary Focus	The "task" dimension of the work/project	Adding the "people" dimension to the "task" dimension

Fifty years ago, project management was mostly used by the U.S. Department of Defense contractors and construction companies. Today, just about everyone is using it in one form or another. The rapid rate of change in technology and the marketplace can put pressure on the traditional organizational structure, which usually is highly bureaucratic and typically cannot respond fast enough to the changing environment.

In comes project management — to aid in integrating complex efforts, utilize resources (people, time, money, equipment, materials, etc.) more efficiently and effectively, and bring more predictability to a chaotic environment.

What Constitutes...

Project Success?

High Commitment?

Superior Communication?

Effective Project Leadership?

DO NOT COPY

Regarding Project Success

In today's fast-paced, rapidly changing world, Project Success means:

Bringing the Project in:

- On time
- Within Budget
- At the proper performance, quality and/or specification levels

With:

- Acceptance by the customer/client/user(s)
- Minimum or mutually agreed upon scope changes

Without:

- Disturbing the main work flow of the organization
- Changing the company culture

How do you REALLY know you have been successful?

The ultimate sign of a successful project is that your customer/client asks you to do more work for them — and you feel extremely secure in using their name as a reference! In fact, they might even refer people to you and your organization!

Regarding High Commitment

Attributes of highly committed project teams:

- They have a clear purpose/goal they all believe in and support.
- They address their conflicts rather than avoid them.
- They create the project's definition and implementation plans together, thus creating the critical buy-in.
- They have clearly defined roles and responsibilities and hold each other accountable for quality and deadlines.
- They put the project purpose/goal ahead of their departmental or individual interests.
- Teams members will do whatever it takes to make the project and the team successful.

Questions for discussion:

? *What are the consequences if the team is NOT highly committed?*

? *What is the project manager's role in creating a highly committed team?*

Regarding Superior Communication

Some aspects of superior communication skills for a project manager are:

- The ability to manage a project and a project team with minimal communication misunderstandings.
- The ability to LISTEN, LISTEN, LISTEN first in order to understand fully the situation at hand before responding.
- The ability to delegate to the appropriate people with clearly defined tasks, measurables, deadlines and expectations.
- The ability to negotiate fairly, clearly and persuasively while creating a win-win situation whenever possible.
- The ability to mediate conflicts to resolution without getting emotionally involved yourself.
- The ability to question key stakeholders to attain their unspoken needs and wants to ensure that the team is working on the right project, immediately out of the start box.
- The ability to effectively run a project team meeting.
- The ability to document the project in writing to team members, peers, clients, subcontractors and senior management in a way that minimizes, if not eliminates, ambiguity and confusion.
- The ability to verbally present the project to a variety of audiences.
- The ability to facilitate the team to generate options on possible project paths to pursue, especially in times of crisis.

You, as a project manager, are a work in progress, developing these leadership skills “on the job” and through applicable trainings.

And, learning these communication skills will help create high commitment by those involved in your projects, thus creating more project successes!

Question for reflection and discussion:

 *In what way does your current level of communication skills hinder your successful management of a project and team? In what areas can you improve?*

What IS Project Leadership?

What is Project Leadership?

Project Leadership is the action of positively leading a team towards the successful completion of a project. It is about getting “something done” through “others”.

Projects also require project “management”. So let’s say that the “management” part is about defining the project, identifying tasks and getting the “job” done — the “science” of project management.

Given this then, project “leadership” is about positively leading the team to get the job done — or the “art” of project management.

It’s about knowing that:

- YOUR TEAM is the most valuable resource you have.
- Your job is to facilitate the project planning well enough to not have to micromanage them during execution, which will then
- Free up your time in order to better communicate with stakeholders and clients, as you are also accountable to those you report to.

Many times organization leaders give “technical experts” the “reward” of managing the project and the team. And many times, their first job is to work on getting the “work” done. The art of leading and developing a team either comes “later” or in many cases, doesn’t happen at all!

Given that there is a **strong** connection between project success and the leadership effectiveness of the project manager, it’s important to know what skills and strategies are most important to understand and apply when and where applicable.

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

John Quincy Adams
6th U.S. President
(1825-1829)

EXERCISE: Why Is Project Leadership Important?

1. List some reasons why project leadership is important in an organization:
2. What typically happens if project leadership is lacking or ineffective?
3. When have you personally experienced effective leadership (in any aspect of your life — past, present, work, school, personal, etc.)?
4. What did you admire about the leader(s)?
5. What are some situations you currently face where developing your leadership skills would be a great benefit?
6. What specific skill would be of great benefit?

Key Skills for Today's Project Managers

Many people feel that the ability to manage a project and a team is just an innate skill — that anyone should be able to do it, that it is so easy that it should be a part-time job, that there really is no “talent” involved in it.

NOT TRUE!!

As projects become bigger, more complex, with more functions affected by them, the ability of a project manager to manage the “big picture” and the “details” is critical for success. In fact, the “easy” part might be to learn the “hard skills”, such as using the project management tools, learning the software, writing the reports, doing the presentations.

What becomes just as critical, if not more so, is managing all the RELATIONSHIPS with and among the people on the project. What follows is a list of the most critical skills necessary for a project manager to attain in order to create more harmony among the team and more project successes.

“ A leader is best when people barely know he exists. Fail to honor people and they fail to honor you. But of a good leader — who talks little when his work is done, his aim fulfilled — they will say ‘We did this ourselves.’ ”

Lao Tzu
Chinese Philosopher

Skill: Flexible Leadership Style

Everyone has a “natural” style or tendency when it comes to leading a team. While a project manager might feel extremely comfortable being “one way” all the time, chances are the team members and stakeholders probably wish this was not so! Different situations require different leadership styles. Being the “right” type of leader at the right time will optimize the chance for a successful outcome and minimize the chance that conflict or a miscommunication will occur.

The three major leadership styles are:

1. Directive

Some attributes of directive leaders:

- Extremely directive
- Quick decision maker/problem solver
- Likes being in control
- Figures out the solution/strategy and tells the team
- Leaves very little room for discussion

Best used when:

- Team members directly report to the project manager
- Team members are new to being on a project team
- The situation is one of “emergency” proportions
- A quick response and “take charge” approach is needed
- The team respects the project manager enough to readily “follow”
- At the beginning of a project when setting direction is needed

2. Participative

Attributes of a participative leader:

- Gets the group involved in decision-making and problem-solving
- Creates enthusiasm within the team by getting them involved
- Might make the final decision or go with the team's recommendation
- Is willing to make changes if the group is convincing

Best used when:

- There is trust between project manager and team members
- You want to develop the team's ability to make decisions and problem solve
- In complex situations where looking at the problem from different perspectives will help make a better decision
- You are willing to adjust your opinions based on the team's inputs

3. Facilitative

Attributes of a facilitative leader:

- Works with the team to create a common vision/goal
- Creates a collaborative team environment
- Creates balanced participation in team meetings
- Lets the team own the problem
- Supports the decision that the team makes

Best used when:

- The team has the expertise to make the “right” decision
- When there is high trust among members and they are operating at a very effective level regarding their group dynamics
- When there is time for brainstorming and the creative process to work
- When the group is “stuck” and no clear decision exists
- When the project manager can totally “let go” of controlling the outcome

The bottom line is — **your style of leadership affects your team members!**

EXERCISE: Flexible Leadership Styles

Think about a project team you are currently managing (or on as a team member). Reflect on an “issue” the team is experiencing.

1. What would be the “best” leadership style to use to address this situation?

2. What is your comfort level in using this style with your team?

3. What would make you MORE confident in addressing this issue?

Skill: Exceptional Communication and Interpersonal Skills

It is often said that the primary reason projects fail is due to “communication” mishaps, NOT for technical reasons. As a project manager, you are at the “hub” of the wheel, the central focus point for all the communications that go on surrounding the project.

To minimize communication errors, it is critical that your communication skills are “high”, which means you communicate well:

- Verbally
- In writing
- In front of a group (meetings, presentations)
- In one-on-one conversations

It is also critical that you model exceptional communication skills with your team and stakeholders. Module 2 will deal with specific skills to increase communication accuracy.

Interpersonal skills also need to be operating at a “high” level.

Consider these questions:

- ❓ *How well do you share what you are really feeling or thinking?
Can you do it without the recipient going on the defensive?*
- ❓ *How approachable are you? Do people come to you easily with issues,
no matter how severe?*
- ❓ *Are you liked and respected by your team members?
Are you easy to get along with?*
- ❓ *How well do you empathize with others when they hit a crisis,
either on the project or in their lives?*
- ❓ *Do you prefer to work with others in a group versus alone?*

Some people are born with magnetism and charisma; others might have to work a bit to develop it. As a project manager, much of your time is involved in interactions with people, even if you are a “technical” project manager. Given this, doing some objective self-analysis of how you interact with others and making refinements, if necessary, will serve you well in the long run.

Skill: Ability to Negotiate and Resolve Conflicts

How capable are you of aiding two team members in resolving a conflict? Can you negotiate with a functional manager to get the person with the critical skills assigned to your team? As a project manager, your probability of success will increase if you have, or can develop, these skill sets.

We will cover Conflict Management and Negotiation in Module 3.

Skill: Building Commitment Within the Team

Building commitment within the team starts with having a clear reason and purpose for being together in the first place. Once that is established, it is always wise to do some relationship building while the team is going through the project definition and planning process.

Underlying this is your understanding of how team dynamics operates. It is not only “getting the job done” that is important — HOW you get it done COUNTS — a lot to most people! There are people who would rather be on a less important project and enjoy working with the team rather than on a “hot” project where there is constant battle, personality issues and conflict.

Do you know how to optimize the possibility for your team to be committed? To you? To the team? To the goal? To the project?

We will cover this in the following section and in Module 3 on Team Dynamics.

Overview of Leadership Strategies

The job of project manager certainly has the potential to be overwhelming. Project managers have the responsibility of ensuring that the project goal is completed, from the task perspective. Complications can arise though, when they have to accomplish the work through teams of people whose attitudes about being on the team and working with each other can range anywhere from excitement to reticence to down-right anger!

What follows are a few strategies to consider when establishing yourself as the Project Manager/Leader and getting the team “on board”.

Strategy: Create a Mission Statement and Goal Statement

In order to get the team off on the right track out of the start box, it is critical that the team agrees on the mission and goal of the project. If they don't agree, it will most definitely show up later during project planning or execution.

Some suggestions on how to go about doing this:

1. Ensure that key stakeholders are identified and interviewed as to their “wants and needs” regarding the project. Do this process with the team if possible.
2. Meet with the team and share all the “data” — the Requirements Documents, the Business Case, the interview results from stakeholders and any other pertinent information. In some cases, before a goal statement can be developed with the team, the bigger project goal or the “business mission” might have to be identified and THEN the project goal can be developed.

EXAMPLE: Business Mission

From assessing the information gathered about the project, it is clear that the organization needs to increase the number of resources skilled in certain highly technical job functions. Given this, the BUSINESS MISSION might be:

To increase the number of technical resources in our R&D divisions.

(Other examples of Business Missions/goals might be to lower costs, improve quality, increase customer satisfaction, etc. These are NOT yet projects!)

3. Develop the project goal statement with the team.

Ask the team:

- *What is the goal for this project?*
- *What are we as a team being asked to accomplish?*
- *What is our reason for being together?*

EXAMPLE: Business Mission Team Questions

If, as in our example, there is a BUSINESS MISSION and it is huge, the next question might be:

- *What is the FIRST STEP that our team might take to move our organization closer towards its ultimate business goal?*

A project goal statement must:

- Define *specifically* what the “work” is that the team will be doing
- Contain an endpoint signifying that the project is complete
- Be realistically attainable and worthwhile to do
- Be able to be accomplished by the team that is at the table

Brainstorm, debate, revise, haggle with the team (using a flipchart helps!) until they ALL agree on the content and wording of **the goal statement**.

EXAMPLE: Goal Statement

To continue with our prior example, a goal statement might be:

To administer a gap analysis comparing our current supply of technically skilled resources with our future needs and deliver a report of recommendations to the Vice President of Human Resources.

Once the report is delivered, the team can disband. When the VP of Human Resources reviews the report, s/he might decide that certain recommendations warrant further study and development. Subsequent project teams can form to continue to achieve the Business Mission, project by project.

The development of a goal statement will take time to do with the team. The benefits of doing this most certainly outweigh the time it takes to create the goal statement. An agreed-to project goal statement:

- Identifies the reason the team is together
- Sets a clear direction and purpose
- Ensures the team is working on the right project at the start of the project
- Starts building the commitment of the team members in support of the project
- Is the “guiding light” to remind the team, if and when they get into trouble or conflict, of why they are together!!

Question for discussion:



What are some possible consequences of a team NOT creating an agreed-to project goal statement at the beginning of the project?

Strategy: Determine and Use a Project Methodology

Once the project goal has been established and agreed to, it is important to have a methodology on how you intend to plan, execute, monitor and control the project. The process used depends upon how formalized your organization is regarding how they manage projects. If a project phase/life cycle exists which contains criteria to move from phase to phase, the job of the project manager is to ensure the project meets all the “deliverables” for each phase exit.

Project phases, strategies, methodologies and tools are taught in most basic project management courses. A generic strategy/methodology follows:

Phase 1 – Project Definition

Determine WHAT this project is about by:

- Collecting all pertinent documentation
- Holding meetings, focus groups, reviews
- Determining key stakeholders and interviewing them

OUTPUT: a Project Charter (and often a Product Requirements Document) that is approved by the appropriate stakeholders

Phase 2 – Planning and Organization

Determine HOW the team will do what they committed to do in the Project Charter by creating a Project Management Plan entailing the details, using the following tools to answer key questions:

Project Planning Tool Used	Question Answered
Work Breakdown Structure (WBS)	What are the tasks that need to be done?
Logic Network	In what order will the tasks be done?
Responsibility Assignment Matrix (RAM)	Who will do each task?
Estimate work and duration for each task	How long will each task take?
PERT Diagram/CPM/Gantt Chart	What is the project schedule?
Resource Loading Charts	How many people are needed? And when?
Calculate project budget	What is the project cost?
Optimize time, cost, scope, quality, resources and risks	What is the best project plan?

Phase 3 – Implementation/Execution

Once the Project Management Plan is approved and a kickoff meeting is held, execute the project plan. Monitor and control the plan by:

- Holding regular team meetings to keep the team on track
- Publishing status reports to stakeholders and the team
- Ensuring that the Project Plan stays valid, and if it doesn't, make adjustments to the plan to reflect reality
- Minimizing changes and scope creep
- Documenting all changes
- Dealing with the issues as they arise
- Keeping the plan valid!

Phase 4 – Project Closeout

Once the project is complete, close it out by:

- Documenting “lessons learned”
- Completing the financial information
- Completing the project documentation
- Delivering the “product” to the “client”
- Developing a “follow-up plan” if necessary
- Giving THANKS and celebrating!

Strategy: Gain Buy-in

What is the BEST way to gain buy-in for your project?

Get the appropriate people involved in the project definition and planning process EARLY in the project!!

It is a well-known fact that people support what they create.

The organization wants teams to be working on the RIGHT project at the RIGHT time to optimize the use of time and money — so get the stakeholders identified and involved early!

The team has plenty of knowledge that the project manager does not have. They do NOT want to be dictated to. Make the project “their project” by getting them involved in the project definition and planning process EARLY. Nothing can beat a team that is committed to doing whatever it takes to bring the project in on time, within budget, meeting (or exceeding) expected results!

Strategy: Establish Credibility

In order to establish credibility with your stakeholders and team members, you as a project manager have to DO what you say you are going to DO!! This means:

- Keeping your commitments — and notifying people immediately if you cannot keep them.
- Following through and not letting things slide through the cracks
- Having less than a 24-hour response time to emails and voicemails
- Being honest about the state of the project and team
- Allowing your team to take the credit for a job well done

Strategy: Create a Trusting Team Environment

While establishing credibility will create “trust” regarding you, there are a few things that can be done to create a trusting team environment, one in which the team members feel “safe” in telling the truth and speaking up on what is on their minds.

- Facilitate the team to create “ground rules” at the beginning of the project. Ensure that the ground rules are not just about the “task” part of the project management, but about the group dynamics and how the team wants to operate “together”.
- Encourage team members to get to know one another outside the project environment. One suggestion is for team members to commit to meeting any team member they don't know that well for lunch or coffee.
- When team membership changes, the team is affected as their group dynamic changes. If a new member is added to the team, explain the ground rules, ensure the person can commit to what their predecessor did, and once again, encourages the current team members to spend one-on-one time with the new member.
- If the team is going to be together on the project for more than 6 months, it is worthwhile to have the team members take personality tests together and share the results. Each person can disclose what “gift” they bring to a team, in addition to identifying a trait that might not always work well while on a project team. This exercise allows the team members to get to know one another at a deeper level and builds their relationships with each other, thus paving the way for people to be able to deal better with their conflicts later on down the road.

The idea is to make it “okay” for people, including you as project manager, to be vulnerable — that is:

- To make a mistake and admit it without fear of judgment from others
- To speak up about concerns, even if it goes against the opinion of most team members
- To be able to admit that you don't have all the answers
- To offer and accept apologies when necessary
- To be able to be questioned about a stance without getting defensive

In today's highly competitive world where missing ONE thing on a project can mean disaster, it greatly behooves you and the team to work on creating an environment of trust.

SELF ASSESSMENT: Project Leadership Skills and Strategies

Instructions: Read each statement and circle the number that most closely reflects your current level of performance using the following scale: 1= Never; 2= Seldom; 3= Sometimes; 4= Frequently.

		Never	Seldom	Sometimes	Frequently
1	I have a clear vision and goal for the project that I manage and align my daily activities around it.	1	2	3	4
2	I work to establish and maintain credibility with the team by being honest, transparent, and giving credit where credit is due.	1	2	3	4
3	I look for opportunities for self-improvement, however small—and, when feasible, in others.	1	2	3	4
4	I clearly state my expectations with the team members at the beginning of a project.	1	2	3	4
5	My communication is clear, convincing, and memorable – in writing and in person.	1	2	3	4
6	I actively work to build trust with my team members by doing what I say I am going to do.	1	2	3	4
7	I work with the team to create both task and behavioral ground rules.	1	2	3	4
8	I support and encourage my team members by assisting them in overcoming any challenges/obstacles that might keep them from accomplishing their tasks on time.	1	2	3	4
9	I negotiate with my team members' bosses about their employee's availability and skill set.	1	2	3	4
10	I show team members I care by getting to know them as individuals.	1	2	3	4

1. The areas that I excel in are:

2. The areas that I could improve upon are:

3. Some actions I can take to start making those improvements are:

Most Important Points for Module 1

Jot down at least three of the Most Important Points you have gathered from this module. As the whole group shares its observations, you may want to add to your list.

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Module 2

The Ins and Outs of Communication Skills

Learning Objectives

At the end of this module, you will be better able to:

- Utilize different communication techniques to communicate with your project stakeholders and team members in a clear, concise way.
- Understand and experience the fact that the same words can mean different things to different people.
- Give and receive constructive feedback, especially during times of anger, disappointment or frustration.
- Understand the different methods of communicating within a project team and minimize the barriers to communication.

Communication Overview

What is Communication?

Communication, defined broadly, is everything we say and do that affects other people and everything they say and do that affects us.

When people in an organization learn to communicate effectively, the organization's efficiency is enhanced. It is likewise with project teams. When the project manager and the team members all learn how to communicate effectively, both within and outside the project team itself, efficiency is enhanced and room for error is greatly diminished.

Communication is cited quite often as one of the most frequent reasons, if not the most frequent reason that a project "fails", i.e., comes in late, over budget and/or doesn't fulfill the requirements that were promised.

IF:

- Communication is open, honest, direct, and accurate, and
- Communication takes place both vertically and horizontally throughout the organization on a regular basis,

THEN

- Efficiency is then enhanced,
- Second-guessing stops,
- Hidden agendas cease to exist, and
- Project teams experience less stress and a much higher success rate!

...and this is possible, IF the project manager and the team members are willing to learn how to communicate more effectively. These skills will help you not only in your work arena, but in your home life, in relationships with kids, spouse, parents — anyone you come in contact with, including yourself!!

Projects are often filled with communication problems.

Questions for discussion:



Reflect on your experiences on project team. Can you recall any "miscommunication" experiences? What was the impact of the "miscommunication" on the team and project?

Look at the following statement:

“I know you *think* you understood what I said, but I am not sure you realize that what you think you heard me say is not what I meant.”

On project teams, communication is an ongoing process.

*So how can you tell if a problem is a **communication** problem?*

Any time either person feels that the quality of the sending or receiving is not good enough for the needs of the situation (your needs, their needs or the project/work needs), then a communication problem exists.

Communications 101	
Sending/Receiving:	
The level of quality in communications depends on two kinds of behaviors — sending messages and receiving messages.	
<i>For a sender to send a clear message:</i>	<i>For the receiver to “get” the message:</i>
<ul style="list-style-type: none"> • Know what it is you intend to convey — the more sharply focused your message, the greater chance it will be conveyed accurately. • Consider writing messages down before speaking them — this can help you clarify your ideas. • Make sure your nonverbal signals are congruent with your message (your facial expression, tone of voice, body language), otherwise you are sending a mixed message! • Follow-up to ensure you have succeeded in conveying your intended meaning. <ul style="list-style-type: none"> – Encourage the receiver to respond or paraphrase your message. – Ask questions to ensure understanding by the receiver. 	<ul style="list-style-type: none"> • Try to “hear” the message and listen fully. • Invite the message. • Attempt to understand the meaning of the words and intention of the speaker. • Try to get a sense of the needs and feelings beneath the words. • Choose an appropriate response and/or ask a question.

Key Points about Communication

- **Relationships are created by communication.** Relationships are measured at the level in which we communicate with someone. Your relationships with project team members will vary according to the depth of communication with them.
- **Relationships are defined by both persons, each being 100% responsible for the nature of the relationship.** “It takes two to tango” so to speak! NO finger pointing allowed in miscommunications — especially on project teams! Both parties take responsibility for their part in the miscommunication!
- **Relationships change when the communications between the people changes.** If you are having trouble communicating with someone on the project team, try changing the way to talk or respond to them. Try agreeing with them or asking more clarifying questions to understand more fully. Let them know it is okay to feel the way they do.
- **To change a relationship requires true desire and persistence.** And changing the way you talk to someone or respond to them takes desire and persistence too!! Remember, you cannot change them. All you can change is yourself and the way you speak, act or respond.
- **Communication is most effective when it reflects our intentions for the relationship.** Watch out for sending mixed messages. Notice when the words and the feelings or behaviors of someone do not match!! This is what can create craziness on the project and within the team.
- **We choose how we communicate, whether consciously or unconsciously.** So start to pay attention to how you are communicating and how you are received by others!! When you speak to the project team, watch them to see how they are responding to your words and adjust accordingly.

Skills to Increase Communication Accuracy

Skill: Use of Open-ended Questions

A closed-ended question is one that is answered with a “yes” or a “no” response or elicits a specific piece of information. Very limited information is gained and a conversation can be quickly shut down.

- How old are you?
- Will you be at the staff meeting on Friday?
- Did you have a good day?

An open-ended question is one that requires more than a “yes” or “no” (or one-word) response. They are broad in nature and give room for considerable freedom in response. Often, they start with “what” or “how”.

- What is your new job like?
- What do you know about copier machines?
- How do you think we should solve that problem?

EXAMPLE:

<i>Think of talking to a project team member.</i>	<i>Think about how the questions can be worded to get more response and a conversation going.</i>
“Are you having any problems running the machine?” “No”	“What kind of issues are you experiencing in running this machine?”
“Do you enjoy being on a project team?” “Yes.”	“What do you feel is the best thing about being on a project team?”
“Do you have any questions about doing this task?” “No.”	“Any ideas about how you’ll proceed in working to accomplish this task?”

When in meetings, whether it be with key stakeholders or interviewing for your next job, it is important to formulate open-ended questions *before* you meet so that you can benefit by getting all the information you need out on the table.

Skill: Perception Checks

Perception refers to the meaning one gives to an event or situation. This varies from person to person as people are raised in different environments and develop unique beliefs, attitudes and values throughout their lives. Differences in background, education, goals, needs, coping with stress all contribute to one's individuality — and this can be a factor in miscommunications.

To increase the accuracy of a communication, try describing what you perceive to be the other's inner state and understanding in order to check whether you do understand what he/she feels.

EXAMPLE:

“I sense you'd like to change the subject. Is this accurate?”

“You seem to be feeling more at home now.”

“You seem unconcerned about the project timeline when you don't turn your report in on time.”

Tentative openings, such as “you seem” or “I sense” or “I noticed that” leave room for the receiver to acknowledge or correct the statement. In this way, you gain clear understanding.

Questioning Techniques

There are different techniques that combine open ended questions and perception checking in order to increase the accuracy of a communication.

1. **Clarification:** “I'm confused about...” or “Can you explain ...?”
2. **Probing:** “Tell me more about...”
3. **Confirmation:** “So, from what you've said, I'm assuming...”
4. **Acknowledgement:** “I sense you're feeling overwhelmed by...”
5. **Building:** “That's a good point. What else?” or “That might work! Tell me more...”

Skill: Paraphrasing

Paraphrasing is any way in which you show the speaker that you understand the message. It can be through words, pictures, asking more questions or showing empathy.

Paraphrasing is the key to increased accuracy in communications and shared understanding. It comes from a true desire to know what the other person means. How do you check to make sure that you understand another person's ideas, information or suggestions as he intended them? How do you know that another's remark means the same to you as it does to them?

You can ask others for clarification by stating “Tell me more.” or “What do you mean?” but this might not be enough. The major question becomes “**Am I understanding his idea as he intended it to be understood?**” In the use of paraphrasing, you repeat back to the other person what you heard them say, in your own words!!

EXAMPLE:

Sandy: Jim should have never become a project manager.

Jason: You mean managing a project isn't the right job for him?

Sandy: Yes!! Project management is not the right job for Jim.

In this example, Jason expressed Sandy's words in another way. Such word-swapping might give the illusion of mutual understanding, as indicated above. But watch what happens when Jason asks a different question.

Sandy: Jim should have never become a project manager.

Jason: You mean he's not good with people?

Sandy: Oh, no! I meant that he's really devoted to his family and this job will require a lot of travel.

Jason: I see. You think he should be in a job that doesn't require traveling?

Sandy: Yes! Project Manager is not the right job for Jim.

Paraphrasing is NOT parroting! Work to paraphrase the speaker's thoughts and feelings, with how you understand them. It doesn't mean you agree or disagree. And if you say something that doesn't quite reflect what the speaker meant, you will be corrected. What you say doesn't have to be perfect — as long as you are sincerely trying to understand. Listen for needs, intentions, and feelings as these are often unspoken.

Paraphrasing Lead-ins:

- “So, as you see it...”
- “You seem...”
- “You sound...”
- “You must have felt...”
- “What I'm hearing is...”
- “You must be feeling...”
- “It sounds like...”

EXERCISE: Paraphrasing Practice

Instructions: Write a paraphrasing statement for each comment below.

1. “I can’t figure out what to do with my new team member. She wants to do things her way instead of our way.”
2. “I keep trying to talk to her, but she just gets mad when I do.”
3. “Since I was promoted to project manager, I worry about making the wrong decisions.”
4. “Just once I wish management around here would listen to the people who do the work.”
5. “They did such a good job selling; I don’t know if we can keep up with delivery.”
6. “My team members’ bosses keep pulling them on and off my project by reprioritizing their work which is affecting the validity of my project plan.”

More Tips for Increasing Communication Accuracy

- **Replace “why” questions**– These are closed-ended and “why” or “why not” questions as they can make the other person feel defensive, even if you didn’t mean it that way. Instead, try asking, “How did this happen?” or “Is there a reason...?”
- **Avoid using absolute statements**– Try to avoid “absolute” statements, such as “You don’t care about this project at all!”. Again, tentative openings, such as “you seem” or “I sense” or “I’m noticing that” leave room for the receiver to acknowledge or correct the statement if you’ve interpreted it incorrectly.
- **Avoid the “you/we need to...” or “you/we should...”** if at all possible. Implicit in these statements is that you know better than they do what “should” occur. This is okay in certain circumstances if you are the subject matter expert, but if you are trying to build a team, you can come off as the “know-it-all”.
- **Watch your use of the word “but”**– Whatever you say after it could negate what came before it — “You did a great job BUT next time...”. It’s better to use AND. “You did a great job AND the next time, maybe.... too!”
- **Be careful of “rubber terms”**– These terms “bounce” when pressure is applied! In other words, they are subjective and can create the perception of agreement, only to find out later, that there really was no agreement. Some examples are:
 - Quality
 - Successful
 - World Class
 - ASAP
 - Timely
 - Superior
 - Excellent
 - Relative
 - Others????

Skill: Listening

Listening is the most important part of communication because without it, the communication is not complete. **Listening is the single most important skill that a project team member or project manager can possess.**

Questions for discussion:

? What does a poor listener do?

? What does a good listener do?

“ Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen. ”

Winston Churchill
British Prime Minister
1874-1965

Consider This:

? Think about the last time someone really listened to you. It might have been a while ago or recently. How did it make you feel?

-
-
-
-

Listening to people makes them feel better about themselves, and therefore, they are then more likely to:

- Speak honestly
- Be open
- Take risks
- Offer suggestions and ideas
- Be creative
- Solve problems
- Participate
- Bring problems and/or solutions to light
- AND the most important one????

Two parties participate in a communication (sender and receiver) but **it is the receiver (listener) who evaluates whether or not the communication worked**. Listening is also the most neglected part of communication. When listening, we all tend to have another dialogue going on in our heads, evaluating and prejudging, instead of listening to the sender's words and intention.

The good news is:

LISTENING IS A SKILL AND CAN BE LEARNED!

Improved listening starts with the effort to pay attention to what is going on in the world of the person speaking.

Here are some steps to listening well:

1. Make an effort to truly “actively listen”.
This means setting aside whatever is going on in your mind — and this includes forming responses before the speaker is done, judging or evaluating their words, rehearsing your answers, etc. It means really listening to what the person has to say by emptying your mind! Be willing to get his or her viewpoint completely before you express yours.
(This is hard work!)
2. Set up the environment and use your body language to show you are listening.
3. Imagine how you would feel if you were in this person's situation.
4. Acknowledge that you have heard the other person by the use of paraphrasing.
5. Watch the speaker's body language. Look for where the body language and words/tone don't match and question this.
6. Remember to keep yourself out of the conversation for now.
 - Don't lead the conversation where you want it to go.
 - Don't introduce your opinions while in the listening role.
 - Don't ask for any new information, only clarity about what they are saying.

**You will get the opportunity to do this when you are the speaker!!

Doing these steps will set the scene so that when it comes your time to talk, you will do so with more understanding and with a greater chance that the other person will listen to you!!

Bad habits that can prevent good listening:

- Convincing yourself that the topic is boring before you even begin listening
- Focusing on the appearance and/or delivery of the speaker
- Listening only to the facts/words and not the overall message
- Allowing emotionally charged words to impact your ability to listen
- Focusing on what you want to say more than what is being said
- Giving unsolicited advice. It can make the speaker feel as if you know better and/or want to change them!

Benefits of listening effectively

- Builds relationships
- Increases productivity
- Solves problems
- Avoids unnecessary conflict

The message you are trying to convey when you are in the listening role is:

“I appreciate your willingness to share your thoughts with me, whether or not I agree with you. I value and respect you as a person even though I might not always agree with your values, opinions or the realism of what you are sharing with me. Please know that I welcome your views because they give me a better chance to understand you, and therefore, to relate to you better.”

“The greatest compliment that was ever paid me was when one asked me what I thought, and attended to my answer.”

Henry David Thoreau
American Author and Poet
(1817-1862)

SELF ASSESSMENT: Listening Skills

Instructions: Read each statement and circle the number that most closely reflects your current level of performance using the following scale: 1= Never; 2= Seldom; 3= Sometimes; 4= Frequently.

		Never	Seldom	Sometimes	Frequently
1	I listen for feelings and attitudes, as well as for facts.	1	2	3	4
2	I listen for unspoken messages by reading body language and/or tone of voice.	1	2	3	4
3	I avoid being distracted, mentally and physically when listening.	1	2	3	4
4	I avoid making snap judgments and jumping to conclusions.	1	2	3	4
5	I avoid thinking of my response while the other person is speaking.	1	2	3	4
6	I focus on the content more than the delivery style.	1	2	3	4
7	I paraphrase to confirm understanding.	1	2	3	4
8	I avoid getting sucked into the other person's emotions.	1	2	3	4
9	I show the speaker I'm listening with appropriate words and responses.	1	2	3	4
10	I listen more than I talk.	1	2	3	4

1. Areas in which I listen well:

2. Areas in which I could improve my listening skills:

3. Actions I am willing to take to improve my listening skills:

Skill: Giving and Receiving Constructive Feedback

It is important for a project manager and team members to learn how to both give and receive constructive feedback. The lack of this skill causes people to:

- Hold things “in”, which eventually can build resentment
- “Triangulate” — in other words, talk to others NOT involved with the issue
- Destroy team commitment by “checking out”

Although it might be uncomfortable, it is best to deal with issues as they arise. This includes not only “task” issues but the “people” issues.

Questions for discussion:

? *What kinds of workplace conversations are difficult?*

? *Why are they so difficult? What are we afraid of?*

Examples of Tough Conversations:

- Delivering bad news, such as layoffs, terminations, or denied requests for promotion, vacations, time off, or change of working hours
- Giving people negative feedback on their performance, behavior, personal habits, or appearance and asking them to make changes
- Saying “no” when people ask you to do something you are unable or unwilling to do
- Asking people to do something unpleasant, difficult, or outside the scope of their responsibility
- Acknowledging mistakes you have made and apologizing
- Others:

Why These Conversations Are Difficult:

- Fear of hurting people’s feelings, making them angry or upset, disappointing them, not being liked, or not being respected
- Feeling of being powerless or not being in control of the situation
- Fear of embarrassing yourself or being seen to fall short in terms of your responsibilities or in some other way
- A reluctance to engage in conflict
- Other:

Constructive Feedback Method

A method to follow in preparing to give constructive feedback starts with the use of “I statements”. These are statements that the speaker uses to take responsibility to “own” his/her feelings, thoughts and reactions. These statements start with “I” rather than “You”. It is much different than conversing through “attacking” or “blaming” language such as “YOU make me so mad!” or “YOU are the reason the project is behind schedule!”

In truth, **no one** makes you feel **anything!!** YOU are responsible for your feelings — so OWN THEM!!

Try dealing with tough issues by sharing your feelings and/or giving the feedback in a constructive way using the following format:

Step	Method /Example
1	(OPTIONAL) GIVE A SINCERE COMPLIMENT <ul style="list-style-type: none"> • “You know I am really grateful that you’ve joined our project team.”
2	STATE THE INTENTION <ul style="list-style-type: none"> • “My purpose in speaking with you is.....”
3	THREE-PART SENTENCE: <ul style="list-style-type: none"> • “When you.....,(describe the specific behavior) • I feel (or think).....(state feeling honestly and specifically) • because.....(explain how what they did affected you or the team)”
4	ASK FOR WHAT YOU WANT <ul style="list-style-type: none"> • “What I would prefer/want is.....” (make it specific and tangible, if possible)
5	ASK FOR FEEDBACK <ul style="list-style-type: none"> • “Would that work for you?” OR • “What are your thoughts on this?”
6	PARAPHRASE THE RECEIVER’S COMMENTS AND THEN WORK TO COME TO AN AGREEMENT ON HOW TO PROCEED.

EXERCISE: Communicating Feedback in a Difficult Situation

Part 1: Reflect on a difficult situation.

Think of a situation in your business or personal life that is causing you distress. Using this situation, answer the following questions to prepare for a “communication” with the appropriate person.

1. What is your intention for the communication? (Why are you initiating the conversation? What is your purpose? What needs to be cleared up?)
2. Identify the facts and relevant issues and/or behaviors that makes you feel need to conduct this communication.
3. What are your reactions and feelings to the above facts? What assumptions can you make about how the other person is likely to see the situation and what they might want?
4. What do you want or need as a result of this communication? Make it as tangible as possible.
5. In what areas do you need to be aware of your own behaviors and responses to make this communication work well in this situation, with this person?

Part 2: Prepare your feedback.

Using the information from Part 1, develop the verbiage of your communication, by completing the sentence in each section.

Step 1: Give a Sincere Compliment (if possible/applicable)

“You know I appreciate all the work you’ve done for the team.”

Step 2: State your Intention

“My intention in speaking with you is... “

Step 3: Three-Part Sentence

Describe the facts:

“When you.....,(describe the specific behavior)

Describe the feelings:

“I feel/felt.....(state feeling honestly and specifically)

because.....(explain how what they did affected you)”

Step 4: Ask for what you want/prefer

“What I would prefer/want is.....” (make it specific and tangible, if possible)

Step 5: Ask for feedback

**Step 6: Together come to agreement on how to proceed.
Agree on any follow-up.**

Part 3: Deliver the Communication.

Form “triads” (groups of 3 people) and DO the exercise, *following the instructor’s directions.*

Observer’s Notes:

When it’s your turn to be the Observer, use this area to jot down observations for feedback.

1. What did you observe about “A’s” use of language and attitude?
2. Did you feel the communication achieved what “A” intended it to? Did it feel authentic?
3. How did “B” receive the communication? Did he/she get defensive? Did he/she seek clarification?
4. What could both “A” and “B” do differently to improve?
5. Other observations?

Listening in Emotional Situations

- **Recognize your hot buttons**– The first step in an emotional situation is to get a handle on your OWN emotions first (breathe, pause, slow down).
 - When have you spoken or acted impulsively and regretted it afterward?
 - What triggered your response? Was it something someone said or did?
 - Is there a pattern? Do you know what triggers you?
 - Do your friends, family or co-workers know what “sets you off”? Can they tell you what makes you irritated or difficult?

- **Avoid these behaviors that can escalate emotions or shut down the conversation**
 - Interrupting
 - Arguing
 - Telling the other person to calm down
 - Giving advice
 - Faking understanding
 - Belittling, condescending or minimizing
 - Jumping to conclusions
 - Touching
 - Defending
 - Evaluating

- **De-escalate emotions**
 - Respect the emotional person’s perceptions as real to him or her.
 - > “If it were me, I might be feeling..”
 - Set clear boundaries while allowing the other person to talk.
 - > “I’m here to listen, but I can’t do that until you slow down and stop swearing.”
 - Use nonthreatening words and an even-tempered tone of voice.
 - Keep responses short.
 - Other:

Strategies for Coping with Responses

If the person is angry: Allow them to “vent,” and let them know that it’s okay to be angry. But if the person becomes violent or physically or verbally abusive, end the conversation immediately. If necessary, call for help.

If the person is in tears: Wait quietly while they get themselves under control and acknowledge their feelings: “I can see that you’re upset...” If the crying becomes too intense or goes on too long, suggest a break: “Let’s take a moment to...”

If the person is frustrated: Acknowledge and empathize with their feelings: “This must be very frustrating for you...” “I can see that you’re very frustrated by...” Show that you want to help the person find alternatives or solutions.

If the person shows resistance: Empathize, focus on facts, and offer evidence. “I understand that you don’t consider this a problem. Let me explain why it is...”

If the person is passive: Ask questions: “Would you like to tell me how the situation looks to you?” “What do you think about...?” “What alternatives can you think of to...?”

Best Practices for Delivering Difficult Messages

- Be clear and specific, and focus on the facts.
- Give examples when possible.
- Be sincere, tell the truth, and provide accurate information.
- If you need more information about the situation, ask questions.
- Allow the other person the chance to ask questions; answer them honestly and briefly, and if you are not able to disclose the information, explain why.
- Stay calm and use positive body language:
 - Sit up straight.
 - Do not cross your arms.
 - Make eye contact, but be careful not to stare or appear menacing.
 - Keep a neutral expression.
 - Sit still, do not fidget.
- Avoid distractions: do not take phone calls, check email, or send text messages.
- Take responsibility when warranted: don’t blame others or try to justify your actions.
- Reframe the situation in a positive light, if appropriate, but don’t lie.
- Plan the communication BEFORE engaging in it.
- Other:

Methods of Communicating within a Project Team

There are many ways in which a team can communicate in today's world, thanks to technology. Then again, this also provides us more methods in which communication can be misunderstood!

What are the methods by which a project team communicates with each other?

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What can you and your team members agree to do when using these methods that would minimize the possibility of miscommunications?

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Barriers to Communication

No matter how well you communicate, make sure you don't let any of the following barriers trip you up!

Language

- Jargon and Terminology
- Use of symbols and gestures
- Tone of voice/body language
- Different meanings for the “same” words

People

- Status and position in the organization
- Cultural differences
- Age differences
- Different use of body language
- Different attitudes, perceptions, interpretations, values
- Different communication skill levels

Organizational Structure

- Filtering of information — how well does the organization communicate?
- Rumors/grapevine
- Work pressures, priority conflicts
- Management of project work vs. functional work
- Virtual teams vs. co-located teams

Question for Discussion:

 *What could you do to overcome (or minimize the impact of) these barriers?*

Most Important Points for Module 2

Jot down at least three of the Most Important Points you have gathered from this module. As the whole group shares its observations, you may want to add to your list.

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DO NOT COPY

Module 3

Understanding Team Dynamics

Learning Objectives

At the end of this module, you will be better able to:

- Identify the characteristics of high-performing, spirited teams.
- Assess the phase that you are in and your project team is in, using the Team Spirit process of development.
- Understand conflict, the role it plays in teams, your conflict style, and methods to deal with it.
- Understand what it takes to facilitate, delegate and make decisions within the team environment.
- Identify and utilize key skills, strategies and tactics needed to successfully manage the negotiation process.
- Understand a Project Manager's sources of power and analyze your ability to influence others.
- Use a checklist on Successful Project Team Behaviors to assess your team and determine possible actions to improve team behaviors.

The *Team Spirit* Process of Team Development

“There is virtually no environment in which teams – if done right – can’t have a measurable impact on the performance of an organization.”

Jon Katzenback

Author of *The Wisdom of Teams*

(1932-)

Assessing Team Behaviors

- Think about a team that is meeting for the first time. What are the behaviors, feelings, attributes present in the room?

- Now think about a high-performing, extremely “spirited”, “can do anything” type of team. What are the behaviors, feelings, attributes of this type of team?

Questions for Discussion:

? What is the difference between “team building” and “team development”?

? Why do the work of developing a team?

Common Team Problems

1. Some individuals have never really learned what their assignments are, particularly for certain plays or situations.
Phase:
2. Some are afraid of the coach/project manager, so they pretend to know things that they should be asking questions about.
Phase:
3. Some want to do things “the old way”, while others feel that more modern methods are needed.
Phase:
4. Factions and cliques quarrel and fight among one another.
Phase:
5. The whole unit has not come together to develop common goals to which everyone is committed.
Phase:
6. Decisions are made by someone, but some people either don’t “get the word” or they disagree with the decision and drag their feet.
Phase:
7. There is jealousy between units and a lack of playing together.
Phase:
8. Even when people are aware of a problem, they don’t know exactly what to do about it.
Phase:
9. Some feel that they never get credit for a job well done.
Phase:

***Team Spirit* Introduction/Background**

Teams are very often overlooked by organizations as the most potentially powerful resource that a company can “call to action” to achieve the business goals necessary to compete in today’s world. With organizations having access to the same information, what differentiates one company from another is how they treat their people and how they motivate their teams to produce extraordinary results.

Welcome *Team Spirit* - a team development process that brings:

- a sense of meaning and purpose to the work that is being accomplished and
- a focus on the way in which this work is being done by the team members.

Team Spirit was created by Barry Heermann, PhD. in 1993 following a retreat he led for organizational development practitioners where the focus was on “teams” and “spirit”. The Spiral emerged with Service at its core.

“Team Spirit” is a blend of concepts and methods from three modes of thinking:

1. **Organization** - contemporary thinking about how teams can be “cultivated” to deliver service and products more efficiently and effectively.
2. **Science** - modern scientific thinking about how all life, from the smallest organisms to the universe, follows similar vibrational and evolutionary patterns.
3. **Spirit** - essential human values from around the world and across time that teach us about our connections to a larger scheme life.

At first glance, these three modes of thinking may seem divergent and disconnected, but when examined closely, they share a common emphasis:

- Each attempts, from a different standpoint, to explain a process that creates oneness out of separateness.
- Each has its own method of “bonding” that takes place before achieving its function.

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For more information, visit www.TeamSpirit123.noblepurpose.com .

The Spiral and Its Phases



Team Spirit weaves the common threads running through organization, science, and spirit into a dynamic model for creating high-performance teams that produce extraordinary results. At its core is SERVICE, which acknowledges that the team exists to serve its customer(s). The model is built on the premise that a high performance team has at its heart, an energy or spirit, shared by all team members.

For more information, visit www.TeamSpirit123.noblepurpose.com.

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Definitions

- **TEAM** - A group of people doing something “together”.
- **SPIRIT** - The animating or vital principle that gives life to organisms.

The Princeton WordNet defines team spirit as “the spirit of a group that makes the members want the group to succeed”.

The energy that creates the spirit of the team connects its members to their ultimate service and helps the team focus on both individual and collaborative growth as well as learning.

- **CONSONANCE** - A combination of musical tones that have “resolved” — they are in agreement or harmonious. The tonalities or qualities that indicate that the group is functioning smoothly.
- **DISSONANCE** - A combination of unresolved musical tones; the atonal qualities that signal a need for the group’s responsiveness.

The Phases

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The Team Spirit spiral is made up of a series of overlapping, interdependent phases, each with its own range of “harmonics”, ranging from consonant to dissonant.

The phases are as follows:

INITIATING - Team members come together to establish their relationships and their direction and to create belonging and a sense of trust.

VISIONING - Team members create a compelling shared image of the customer satisfaction that inspires their work.

CLAIMING - Team members empower themselves by “claiming” the goals, roles, competence and resources necessary to realize their vision.

CELEBRATING - Team members acknowledge what their work as a team has made possible.

LETTING GO - Team members communicate their disappointments, frustrations and concerns regarding the goals and process of the team.

SERVICE - Service is at the spiral’s core. It means the valuing and honoring by the team of those it serves, including each other. It is the team’s capacity to deliver service that surprises and delights their customers.

Team Spirit Harmonics

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CONSONANCES	DISSONANCES
INITIATING	
Orientation - to become familiarized and aware	Disorientation - to experience disequilibrium and fear
Belonging - to feel allied to and a part of the team	Alienation - to feel life a misfit, not a part of the team
Trust - to feel reliant and secure about the team	Mistrust - to feel insecure and cautious about the team
VISIONING	
Shared Vision/Values - to have mutual understanding of what is possible and its underlying worth and merit	Ambiguous Vision/Values - to experience uncertainty about what is possible — and its underlying worth and merit
Compassion - to experience empathy and concern for another's welfare	Callousness – to be insensitive and harsh
Presence - deeply experiencing the purpose of the team	Aridness - feeling barren and empty, without a sense of purpose
CLAIMING	
Goal/Role Alignment - to agree upon the outcome and the means for achieving it	Nonalignment - to disagree about the outcome and means for achieving the outcome
Organization Support - to secure the necessary resources from the organization	Nonsupport - to be unable to secure the necessary resources from the organization
Competence - developing skills and awareness needed to perform team roles	Deficiency - to lack the skills and awareness needed to perform necessary roles
CELEBRATING	
Appreciation - to feel recognized and acknowledged	Nonappreciation - to not feel recognized and acknowledged
Energy - to experience vitality and aliveness	Burnout - to feel used up and ineffective
Wonder - to experience an unbounded sense of possibility	Disenchantment - to feel repelled and put out
LETTING GO	
Disclosure - to express withheld communication	Withheld Communication - to hold back communication from another
Constructive Feedback - to provide forthright response designed to contribute to another	Criticism - to offer critical, hurtful feedback to another
Completion - to feel a sense of freedom because everything has been said	Incompletion - to feel overwrought because of withheld communication
SERVICE	
Contribution - to generously and freely give or bestow something to another	Depletion - feeling used up, unable to freely give or bestow something to another
Aligned Execution - to fulfill intended outcomes in a unified way	Uncoordinated Action - to incompletely fulfill intended outcomes, in an un-unified way
Mutual Support - to provide reciprocal assistance	Unsupportiveness - to act autonomously of others

For more information, visit www.Team-Spirit123.noblepurpose.com

EXERCISE: Team Spirit

1. Return to the page “Common Team Problems” (page 3-3) and identify which phase of the spiral that each problem might happen in.

2. Reflect on a team that you are currently on or managing.

- What phase of the spiral describes the team’s dynamics?

- Is it consonant or dissonant?

- What is the impact to the team and/or its purpose?

- What phase of the spiral describes YOUR participation on the team?

- Is it consonant or dissonant?

- What is the impact to the team and/or its purpose?

Team Spirit and Project Teams

As a project team starts up, it evolves through the first three phases of the Spiral – the Initiating, Visioning, and Claiming stages. From a project process perspective, this aligns with:

- Beginning the project (Initiating - developing relationships, which continues into the project)
- Creating a Project Charter (Visioning - defining the team’s purpose)
- Developing the Detailed Project Plan (Claiming - the working out of agreed upon objectives, “how-to’s” and roles)

As the team begins execution and matures in its process, it becomes ready for the more interpersonal dimensions of Celebrating, Letting Go and providing Service.

After assessing your team’s current state, the phase of the Spiral that you utilize depends upon your objective.

Objective	Focus Area
To build morale or energize the team	Initiating - create deeper relationships Celebrating - acknowledge the good work done by the team
To resolve conflict or communicate more clearly	Letting Go - to foster clear, forthright communication and respond to break-downs between members
To encourage the creative process or future possibilities	Visioning - to create future team projects Claiming - to decide roles in the creative alternatives presented Service - to remind the team of the importance of serving customers and the team
To provide constructive feedback	Letting Go - to foster honest, open communication and come to completion on issues
To clarify team roles and responsibilities	Claiming - to provide structure for creating ownership and alignment of team’s goals and roles
To encourage a sense of accomplishment and fun	Celebrating - to encourage team animation and celebration

“ The team with the best athletes doesn’t usually win. It’s the team with the athletes who play best together. ”

Lisa Fernandez
Softball Legend
(1971-)

Conflict Management

Conflict is a major reason that people dislike working in teams. But the truth is:

ALL TEAMS GET INTO CONFLICT!!!

Anytime two or more people get together to accomplish something, conflict is bound to arise. The team members all come from different backgrounds, different disciplines, different educations, different families. They have different expectations, different social and communication styles, hidden agendas. Why when you think about it, it's a wonder anything gets done!!

Given that conflict is inevitable, a project manager and the team members CAN learn how to manage themselves through it.

Many might think that avoidance of conflict is the “goal”, but in reality, avoidance of conflict can sometimes result in much bigger issues than if the “molehill” had been addressed before it became a “mountain” (or volcano!).

A skilled Project Manager manages conflict by creating a place where differences of opinion and new ideas can be heard, discussed and assessed by the team members. In this way, the team keeps the conflict and how they handle it “healthy”.

Question:

 *When does “healthy” conflict become “unhealthy”?*

Answer: _____

Signs a Team is in Conflict

Some teams might feel that they are “high performing” because they never experience conflict. But look beneath the surface!! Know that conflict can be obvious but it can also show up in very “subtle” ways!!

- Are members missing meetings?
- Are members all participating in the meetings or reading memos or staring out the windows?
- Is your project on track in all areas? Or are members doing what they want to do when they want to do it?
- Are cliques forming and dominating the team meetings?

- Is there a lot of side-talk during meetings?
- Do people talk about other team members behind their backs?
- Others???

If so, the team is in conflict!

Sources of Conflict for Project Teams

- Lack of Resources (people, equipment, money)
- Lack of agreement among stakeholders
- Tight schedules
- Conflicting priorities
- Constantly changing goal and/or project scope
- Technical issues and opinions
- Unclear project procedures and processes
- Personality issues
- Interpersonal issues among team members
- Differences in values
- Others?

Key Points about Conflict

It is recommended that Project Managers and team members understand the following points about conflict:

- **Conflict is normal and inevitable.** Project team members know that conflict, disagreement and discussion of disparate ideas are bound to occur in highly committed and spirited teams. They learn to see conflict as “the prelude to creativity”. Conflict opens up the opportunity to create something new and contribute to positive change.
- **The earlier on in a project that conflict occurs, the better.** There is something to the statement that “if you plan well, execution should be a breeze”. Most teams that don’t plan well have conflict occurring throughout the project. A project team that takes the time to plan knows that conflict will arise and need to be resolved before the Project Management Plan can be finalized. The good news is that by doing this, the team can look forward to a smoother execution of the project!

- **Conflict is resolved through open discussion.** Since conflict is normal and expected within the group, it is addressed by open and direct dialogue. Conflicts can sharpen differences, give opportunities to present different options and provide checks and balances within project teams that are willing to be open in their discussions. Be aware when a rigid position is being maintained rather than staying open. Usually the issue for the rigid person is bigger than just the issue at hand!
- **Conflict is about project issues, not about team members' personalities.** People may be parties to the conflict, but they should not be part of the issue. Project team members might disagree with one another but no one should be the target of humiliating or embarrassing comments. Focus on the issues and individuals' interpretation of the issues, not the personalities involved.
- **Conflict instigates the creation of different options.** There is no finger pointing or blaming involved when a problem or failure occurs. The project team searches for options, answering the question "How do we proceed from here?" Team members try to help each other look beyond self-interest and see what is best for the team and the project.
- **The team owns its conflicts.** In a successful project team, disagreements that affect certain team members become issues for the entire group to deal with, because they can and do affect the workings of the entire team. The whole team can work the issue by asking, "What are we going to do to resolve this?"
- **Conflict resolution occurs in the here and now.** A discussion of conflict focuses on what is happening within the project team now, leaving past disagreements and behaviors out of the discussion. What matters is what is happening right here, right now. If there are past issues to be resolved, do so at a different time with the appropriate individuals.
- **Conflict is necessary, as it leads the project team to become successful.** As in any relationship between people, as the project team deals with and resolves its issues, it moves into being a more productive, confident, successful, and in some cases, a high-performing, spirited team.

Ways to Approach Conflict in Project Teams

Everyone, over time, develops a different style for handling conflict. These habits might help us or hinder us. It is important to become aware of our personal style, the consequences of that style and then learn some alternative methods. In doing this, we can make wiser choices that are more productive, helpful and foster the attainment of the end result we seek.

EXERCISE: Ways to Approach Conflict

- **Avoidance** – In this style, the person avoids the conflict, delays the issue or withdraws from the situation. It’s the “flight” syndrome.
 - HOW IT “SHOWS UP”:

 - ADVANTAGES:

 - DISADVANTAGES:

 - WHEN BEST USED:

- **Accommodating** – In this approach to conflict, a person is more concerned with meeting the needs of the other person or group so they give up their needs to satisfy the other’s desires.
 - HOW IT “SHOWS UP”:

 - ADVANTAGES:

 - DISADVANTAGES:

 - WHEN BEST USED:

- **Compromising** – This is an attempt to find the “middle ground”. Both parties give up a few things in order to come to agreement. “Give something to get something” is evident in this approach. No one truly gets all they want.

– HOW IT “SHOWS UP”:

– ADVANTAGES:

– DISADVANTAGES:

– WHEN BEST USED:

- **Forcing/Competing** – This is the “my way or the highway” approach or a “I win-you lose” situation. One person pushes for their goals with zero concern for the other person’s needs or goals.

– HOW IT “SHOWS UP”:

– ADVANTAGES:

– DISADVANTAGES:

– WHEN BEST USED:

- **Collaborating** – Both parties work together to come to a mutually beneficial solution, with both parties needs and desires being met. It’s a “win-win” situation that explores the depths of the problem and works creatively until a 100% acceptable solution is found.
 - HOW IT “SHOWS UP”:

 - ADVANTAGES:

 - DISADVANTAGES:

 - WHEN BEST USED:

Tips on Managing Conflict

When conflict arises, keep the following in mind:

- Avoid talking about the person with whom you are in conflict. Instead, talk to them.
- The person on the other side of the conflict has a point of view that is just as legitimate and reasonable to him or her as yours is to you.
- The other person may be as uncomfortable about the conflict or disagreement as you are.
- The other person is often willing to find a solution if you are sincere about your intentions. At least he or she can be persuaded to work with you to formulate a resolution to the conflict.
- It is safer and wiser to keep to the issues in any discussion and to avoid arguments that are personal.
- The future is often a more constructive base for discussion than the past. Rather than dwell on what or who caused the conflict, emphasize what can be done to provide a solution or an alternative to the situation that exists now.

When someone disagrees with your viewpoint, BE CURIOUS! Ask yourself:

“What makes them see the situation so differently than I do?”

“What might I be missing here?”

EXERCISE: You and Conflict

Think about the conflicts you have been in recently.

1. What is the style you most often use with:

- Your project team members
- Your key stakeholder
- Your boss
- Your significant other
- Your best friend

2. Think of a specific conflict you have been involved with recently.

- What style did you use? Was it appropriate?
- What style did the other person use?
- If you had to do it over again, what would you do differently?

3. Do you ever avoid addressing issues with people? Why do you think you do this?
What would make it easier for you to confront issues as they arise?

4. What did you learn about yourself through this section on conflict?

Barriers to Collaboration

Collaboration means not only problem solving within the project team but creating new and better solutions to the problems and issues at hand. A Project Manager can strive to lead the team in ways that creates synergy, where the sum of the parts is greater than the whole, or 2+2 is greater than 4. Project teams have “collective wisdom”, meaning that by working together, they can come up with ideas and solutions that not one of them could do alone.

What are some of the barriers that can inhibit a project team’s effectiveness in collaborating?

- Judging of others’ statements and ideas
- Poor listening skills
- A member’s “need to be right” at all costs
- Attacking of people rather than problems
- Presuming that we already know the answer
- Lack of trust among team members
- Dominance by some team members
- Lack of openness and honesty
- Differences in perceptions, belief, attitudes and values
- Lack of communication/conflict resolution skills
- Language and cultural barriers
- Defensive communication
- Prejudice
- Lack of information
- Feelings of alienation, of not feeling part of the team
- Others??

Question:



What would you do to overcome each of these barriers?



What are some of the ways to promote collaboration among a project team?

-
-
-
-

Using Mediation to Resolve Conflict

Once in a while, as a Project Manager you might find yourself in the middle of a dispute between two members of your project – they could be team members or stakeholders. It doesn't matter who they are or what the issue is. What matters is how you mediate the disagreement.

What is Mediation?

Mediation is a method of resolving disputes in which a neutral third party assists both parties to discuss their problems with the intention of finding their own mutually agree-upon solution.

Basic Mediation Concepts

- Mediation is based upon cooperation rather than competition. It works best if both parties willingly participate. In other words, mediation is voluntary.
- Mediation is done to find a “win-win” situation where the participants work to resolve their issue and put it behind them completely. The solution needs to be fair, safe and have a very high probability of working.
- Mediation gets past the “what happened?” and gets into the feelings and needs of the participants.
- The success of the mediation depends upon the openness and honesty of both parties and the mediator. It is non-threatening and non-punitive.
- Mediation focuses on the future and “what's next?” instead of dwelling on the past.

Role of the Mediator

- Retains a neutral position throughout the mediation process. (If you can't be neutral and you know it in advance, DO NOT mediate!)
- Creates a safe place for both parties to be as open and honest as they choose to be. Confidentiality is a must!
- Facilitates the mediation by using communication and listening skills – open-ended questions, paraphrasing, summarizing, feedback, perception checks, active listening.
- Separates the problem from the personality issues.
- Helps the participants to develop reasonable proposals, prioritize options, make agreements and come to closure.

Role of the each Participant

- Agrees that their participation is voluntary and that they want to resolve the problem.
- Abides by the rules and structure of the mediation process, as laid out by the mediator – including confidentiality.
- Takes ownership of their needs, feelings and thoughts, i.e., avoid finger-pointing and blaming.
- Takes responsibility for the decision/agreement that is made.

Basic Mediation Process

#	Step	Description
1	Agree to Mediate	Mediator meets with both parties separately to explain mediation process, hear their side of the story and obtain their agreement to participate in mediation.
2	Open the Mediation Session	Welcome the participants. Review the mediation process and set the ground rules. Ensure that participants still want to mediate their dispute.
3	Gather Information	Allow each participant to tell his/her story – what happened, how did it make them feel, how life has been like since the event.
4	Ensure Understanding	Make sure each participant has heard the other person's viewpoint and understands it (doesn't have to agree).
5	Entertain Possible Solutions	Work to negotiate a fair solution that resolves the problem for both participants.
6	Write an Agreement	Put the agreement in writing (if appropriate) using the words of the participants.
7	Wrap-up	Thank the participants for their hard work and congratulate them on the outcome.

Mediation Booby Traps

If you decide to mediate a dispute, it is as important to know what NOT to do as it is to know what to do. Below are a few booby traps to watch out for.

✗ DON'T	✓ DO
Search for the truth (you are not a lawyer)	<ul style="list-style-type: none"> Acknowledge what they say by restating and paraphrasing
Ask "Why?" questions	<ul style="list-style-type: none"> Say "Tell me more about..."
Make judgmental comments ("This isn't a big deal...")	<ul style="list-style-type: none"> Validate what a participant says "This issue certainly means a lot to you."
Argue with the disputant	<ul style="list-style-type: none"> Paraphrase, restate, reframe the issue as appropriate
Give advice or tell them what to do	<ul style="list-style-type: none"> Ask them what possibilities exist to resolve their issue
Force the disputants to come to agreement	<ul style="list-style-type: none"> Ask them to consider solutions Ask them the consequences of not coming to agreement
Ask too many questions	<ul style="list-style-type: none"> Use active listening; allow the disputants the time and opportunity to open up

Although you as a person are entitled to your opinions, as a mediator it is critical that during the mediation, you stay as neutral as possible. If you find yourself interjecting biased comments or getting "triggered" by one of the disputants, take a break to regroup and gather your thoughts!

Question for reflection:



Are there any scenarios going on around your projects that might warrant your presence as a mediator?

In Summary....

Remember — **conflict is good!**

It is a necessary stage in the development of any relationship or any project team. Conflict offers us an opportunity to learn more about ourselves and the other person involved in the dispute. It takes a conflict to really get to know the other party and can tell us much about ourselves. Conflict provides a stage for positive change and creativity to occur.

*It's not the conflict that matters —
it's how you handle the conflict that is important!*

Project managers who work with their teams to face and acknowledge each others' differences will foster an environment where all members accept, respect and value each other — and optimize the possibility of creating a highly spirited and committed project team.

Facilitation, Delegation and Decision Making

Once again, managing a project is not only about managing the “tasks”. It also involves managing the process, team, stakeholders, and relationships. A project manager’s ability to facilitate, delegate and make decisions is critical to improving their personal success – and the productivity and success of the team as well.

About Facilitation

One of the things that a project manager will have to do is run meetings. While this is not a course in “meeting management”, the ability to facilitate is a critical skillset for a leader to develop.

What is Facilitation?

Facilitation is the process of enabling groups to work effectively and cooperatively together; to guide them towards an agreed upon outcome.

What is the Role of a Facilitator?

A facilitator is someone who engages in facilitation. A facilitator often helps a group of people to have an effective dialog by:

- Creating and/or understand their common objectives and differences
- Planning how to achieve these objectives
- Making decisions and commitments
- Planning future actions

Key Points About Facilitation

- The facilitator remains “neutral”, meaning he/she does not take a particular position any discussions. An exception to this would be if the facilitator does have the appropriate expertise and asks “permission” to add their “two cents” to the discussion.
- Facilitation skills are especially important in circumstances where people of diverse backgrounds, interests and capabilities work together.
- The role of facilitator usually done by the project manager, who chairs the meeting, encourages participation and ideas, and keeps the meeting on track.
- The ultimate goal of a facilitation session is to map out the best possible course for the project to ensure its success. If done effectively, facilitation techniques can turn out to be a game-changing project management method.
- The project manager doesn’t contribute to the “content” of a facilitation session but oversees the contribution from other members and defines objectives for the session. In the end if it went well, it looks like the team did it all themselves!

When to Use Facilitation Techniques?

- **Developing Project Charter**

Facilitation is used here to reach common ground regarding the goal, objectives, high level scope, deliverables & outcome of the project. It aids in aligning the requirements of various groups towards a common solution. The project manager can use facilitation techniques, in this case, to get all the major stakeholders on the same page and agree on the definition of the project.

- **Developing the detailed Project Management Plan**

Facilitation ensures effective participation of stakeholders and particularly, all team members, who are able to reach a mutual understanding which results in creating an realistic project management plan to generate the scope, schedule, and cost baselines of the project.

- **Joint Application Design/Development (JAD) Sessions**

JAD sessions are mostly utilized in the software development industry, where such facilitated sessions bring the development team and the Subject Matter Experts together to chart out the optimal development plan.

- **Defining Scope of the Project**

Facilitation is utilized in working sessions or workshops with major stakeholders and team members in order to define the scope and requirements of the project and/or the product being developed. The output could be the Scope Statement and/or the Product Requirements Document. The goal of facilitation techniques here is to reach a common understanding of the outcomes and the boundaries of the project and the functionality of the product.

- **Identifying Project Risks**

Facilitation techniques can help improve the effectiveness of deploying individual or overall project risks. A good project leader must have the ability to inspire the team to identify and understand the risk, develop and fool-proof the risk aversion or tackling strategy, choose an appropriate alternative response strategy, and overcome sources of bias. As any huge disruption in the market also counts as risk, change management also falls under the scope of facilitation techniques.

- **Re-planning the project when the documented plan is no longer valid**

The more “unknowns” you have on your project, the more assumptions you and the team have to make on what you think will happen. During the execution phase, chances are you will need to re-plan the project (sometimes called “re-baseline”) the project in order to bring the schedule, cost, scope and quality in sync with the new reality.

Facilitation Tips and Techniques

1. **Proper planning** is the key to success for any facilitation session. The project manager needs to decide a single issue to be addressed in one session. It must be extremely clear to everyone what major issue will be addressed, and everyone must have prepared for that only. The agenda of the meeting must be based on this objective only while also outlining the contributions expected from specific participants.
2. **Develop ground rules**, and ensure that all participants agree to them. These are useful in that they can prevent dysfunctional behaviors before they start. Some examples are:
 - All ideas are valid
 - Be open-minded; listen to others
 - All participants are equal
 - Cell phones are “off”
 - All participate
 - Be on time
 - One person talks at a time
3. Facilitations work best when individuals are made to **feel safe** in expressing their ideas. Encourage all participants to listen to what others are saying. If a session is splintering into separate discussion groups, halt them politely and ask them to deal with one discussion at a time.
4. Strive for **balanced participation**. Pay attention to the room and the behaviors (at all times!) — It’s okay to say “Paul, thanks for sharing. Cheryl, do you have anything to add to that?”
5. Be mindful of **timing issues**. It is easy to over-schedule activities and not allow enough downtime for the participants — to digest, discuss or even have a break! Avoid planning intensive activities directly before or after a meal. Always plan for activities taking longer than you think they will last. Facilitators need to constantly check-in with the group to gauge their energy level and sense when it’s time to change things up or take a break.
6. Your behavior affects the others. **Lead by example** and encourage cooperative behaviors by behaving in a way that is at all times honest, open, respectful and non-partisan. If a disagreement arises, do not take sides. Instead, ask the group to resolve the issue.

7. Your job is to **stay “neutral”**. Facilitation can take a lot of mental effort, meaning that it can be difficult to think about and contribute content while facilitating. So if you have an interest in the outcome, or have skills, experience, information or authority which is important for a successful outcome, then consider bringing in an external facilitator.
8. Finally, **RELAX** and **PRACTICE**. Many people are nervous about facilitation. Know that your nervousness is much more apparent to yourself than to others. Remember that it is the responsibility of the **TEAM** to work towards the required outcome — your responsibility is simply to *support the process*. Also, practicing will calm the butterflies in your stomach, and lead you on the way to being proficient.

In Summary....

Successful execution of a facilitation session is considered as one of the most necessary project management skills of a leader, as sometimes the whole progress of the project depends on the outcomes of a session.

To be an effective facilitator you must know when to take a leadership role, and when to be neutral and take a back seat. This is a difficult balance to maintain! The key to being proficient in the role is to plan and guide the proceedings effectively, and remain focused on the group process and outcomes, rather than specific content and opinions involved.

Facilitation is an interesting, rewarding and important role to take on. When facilitating, take time to think about the process and agenda, and learn the skills you need to take the event through to a successful conclusion. Take pride in the role of facilitation, and enjoy watching the ideas, solutions and successful outcomes flow!

“Facilitation techniques involve getting people together to create new knowledge. As the facilitator, the Project Manager needs to encourage all ideas, resolve conflicts between contributors and achieve the goal of the exercise — be it a set of requirements or a Project Charter. Suggestions need to be encouraged, while criticism must remain objective. No idea is so ridiculous that it should not get a hearing — something that is totally crazy might trigger an ingenious idea from someone else around the table. A successful facilitation session should have surprising results!”

Velopi Seamus Collins, Being a Facilitating Project Manager

August 2014 – www.velopi.com/news/pmi-pmp-free-project-management-resource-facilitating

About Delegation

What is Delegation?

Delegation is about entrusting work to another person, with the expectation that the work will be done with your and/or the group's best interest in mind.

As a Project Manager, it can be a difficult transition to let your team do the work, especially if you are used to being an individual contributor and doing the work yourself. The problem is that if you do not learn to let your team “step up to the plate” and OWN the work, you might just find yourself doing most of the work you used to do and more! This then creates a vicious cycle of blaming your team for being lazy, when you are really the one controlling the work. Let's look at some aspects of delegation.

Questions for discussion:



Have you ever experienced a situation in which you were capable of making a decision, yet were prevented from making it? How did it make you feel? Why do you think you were not allowed to make the decision?

What are some reasons why Project Managers don't delegate?

-
-
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-
-
-

What are the “paybacks” or consequences of NOT delegating? (These can be “positive” or “negative”.)

-
-
-
-
-

What are some benefits a Project Manager might experience by delegating?

-
-
-
-
-

What are some “tips” on how to delegate successfully?

-
-
-
-
-

Here is a leadership truth:

SELF ASSESSMENT: Delegation Skills

To determine whether you are a good candidate for considering delegation as a tool to improve your (and thereby your team's) performance, take this simple quiz.

#	Question	Yes	No
1	Do you forgive when a team member makes a mistake?		
2	Do you frequently take work home or work late at the office?		
3	Does your team function smoothly when you are absent?		
4	Do you over-rule or reverse decisions made by team members?		
5	If you were incapacitated for 6 months, could a team member take over the project fairly easily?		
6	Do you do some things your team members could be doing?		
7	Do your team members take initiative without input from you?		
8	When you return from a trip or training, is there a big pile in your inbox?		
9	Do your team members delegate to their teams (if applicable)?		
10	Do you spend time on details that you would rather spend on planning and supervision?		
TOTAL			

Scoring:

To determine whether learning to delegate more often might be beneficial, give yourself one point for each answer of **Yes** on the even-numbered questions (2, 4, 6, 8, and 10), and one point for each answer of **No** on the odd-numbered questions (1, 3, 5, 7, and 9).

The higher your score, the more likely you are to need to use delegation more than you are now. Any score higher than 5 indicates some need for additional delegation of tasks.

EXERCISE: Levels of Delegation

These examples of different delegation levels progressively offer, encourage and enable more delegated freedom.

- Level 1 is the lowest level of delegated freedom (basically none).
- Level 10 is the highest level typically (and rarely) found in organizations.

Before continuing, think about a situation in which you need to delegate some work to another person. Keep this in mind while reading through these levels and determine which one might be the best on for your situation.

1. **“Wait to be told.” or “Do exactly what I say.” or “Follow these instructions precisely.”**
This is instruction. There is no delegated freedom at all.
2. **“Look into this and tell me the situation. I’ll decide.”**
This is asking for investigation and analysis but no recommendation. The person delegating retains responsibility for assessing options prior to making the decision.
3. **“Look into this and tell me the situation. We’ll decide together.”**
This has a subtle important difference to the above. This level of delegation encourages and enables the analysis and decision to be a shared process, which can be very helpful in coaching and development.
4. **“Tell me the situation and what help you need from me in assessing and handling it. Then we’ll decide.”**
This opens the possibility of greater freedom for analysis and decision-making, subject to both people agreeing this is appropriate. Again, this level is helpful in growing and defining coaching and development relationships.
5. **“Give me your analysis of the situation (reasons, options, pros and cons) and recommendation. I’ll let you know whether you can go ahead.”**
Asks for analysis and recommendation, but you will check the thinking before deciding.
6. **“Decide and let me know your decision, and wait for my go-ahead before proceeding.”**
The other person is trusted to assess the situation and options and is probably competent enough to decide and implement too, but for reasons of task importance, or competence, or perhaps externally changing factors, the boss prefers to keep control of timing. This level of delegation can be frustrating for people if used too often or for too long, and in any event the reason for keeping people waiting, after they’ve inevitably invested time and effort, needs to be explained.

7. **“Decide and let me know your decision, then go ahead unless I say not to.”**

Now the other person begins to control the action. The subtle increase in responsibility saves time. The default is now positive rather than negative. This is a very liberating change in delegated freedom, and incidentally one that can also be used very effectively when seeking responsibility from above or elsewhere in an organization, especially one which is strangled by indecision and bureaucracy. For example, “Here is my analysis and recommendation; I will proceed unless you tell me otherwise by (date).”

8. **“Decide and take action – let me know what you did (and what happened).”**

This delegation level, as with each increase up the scale, saves even more time. This level of delegation also enables a degree of follow-up by the manager as to the effectiveness of the delegated responsibility, which is necessary when people are being managed from a greater distance, or more ‘hands-off’. The level also allows and invites positive feedback by the manager, which is helpful in coaching and development of course.

9. **“Decide and take action. You need not check back with me.”**

The most freedom that you can give to another person when you still need to retain responsibility for the activity. A high level of confidence is necessary, and you would normally assess the quality of the activity after the event according to overall results, potentially weeks or months later. Feedback and review remain helpful and important, although the relationship is more likely one of mentoring, rather than coaching per se.

10. **“Decide where action needs to be taken and manage the situation accordingly. It’s your area of responsibility now.”**

The most freedom that you can give to the other person is not generally used without formal change of a person’s job role. It’s the delegation of a strategic responsibility. This gives the other person responsibility for defining what changes projects, tasks, analysis and decisions are necessary for the management of a particular area of responsibility, as well as the task or project or change itself, and how the initiative or change is to be implemented and measured, etc. This amounts to delegating part of your job – not just a task or project. You’d use this utmost level of delegation (for example) when developing a successor, or as part of an intentional and agreed plan to devolve some of your job accountability in a formal sense.

Source: <http://www.businessballs.com/delegation.htm>

Question:



What is the tool used in project planning that assists a project manager to “let go of the work” and have the team step up?

About Decision Making

Decisions, decisions, decisions! There are a lot of them to be made when running a project and team — by you, a team member, a sub-team, or the entire team.

Two Categories of Tough Decisions

A decision is tough when you can't decide what to do. There can be a number of reasons why deciding is difficult — but a conflict of values or a fear of making the wrong choice is often the cause. There are two general categories of “tough decisions”:

1. **The *decision* itself is tough** — you really don't know what to do.
2. **The *implementation* is tough** — you know what to do but are concerned about potential consequences, such as upsetting others, failure, or change.

Important vs. Tough Decisions

Some decisions are tough but not important. In general, if there are not significant differences in the potential outcomes, then the decision is unimportant.

EXAMPLE:

Buying a car — there are usually several models that will deliver the same outcome: for instance, reliability, good gas mileage, interior space, etc.

The key point is to save your time and energy for decisions that are tough AND important. Most tough and important decisions involve personal values, and often a conflict of values. An example of this is deciding whether or not to pursue a promotion that will require more time away from your family.

Important	Tough	Tough AND Important
When the outcome among options is substantially different.	When you can't decide what to do.	Often involve conflicting personal values.

EXERCISE: Identify Different Types of Decisions

Instructions: Working with your group, describe an example of an important decision, a tough decision, and a tough AND important decision. Be prepared to explain why you categorized each as such.

- **Important decision:**

- **Tough decision:**

- **Important and tough decision:**

What Is a Good Decision?

- **Our definition:**

- **Course's definition:**

The most important thing to consider before making a decision (in the project world) is:

Decision Making Techniques

1. **Autocratic decision making** – One individual takes responsibility for making the decision for the group.
2. **Voting** – This is a collective decision making technique, which can be broken down into 3 types:
 - **Unanimity** – The decision which is reached is agreed to by everyone.
 - **Majority** – The decision made is supported by 51% or more of the group.
 - **Super majority** – The decision made is supported by 2/3 of the group or more (66.6%).
 - **Plurality** – The decision made is supported by the largest “block” in the group, even if it’s not above, for example, 50%).
3. **Multi-criteria decision analysis** – This technique is used when the situation is complex with multiple and often conflicting objectives that the participants value differently.
4. **Consensus** – In its simplest form, consensus is “general” agreement. Some people think that consensus means that everyone involved is in “total” agreement. Others think that consensus is “majority rules”. This is not necessarily so. In the world of teams, the meaning of the term “consensus” falls between “general agreement” and “total agreement”.

What is Consensus?

Consensus is the willingness of everyone involved to support the team’s decision, even if the decision chosen was not everyone’s first choice.

Questions for discussion:

1.  *What are the pros of using each of the above 4 decision making techniques to make a decision in the project environment? What are the cons?*
2.  *In a project environment, under what circumstances is it best to make a decision alone?*

In order to use consensus well, analyze the decision that needs to be made. Ask yourself the following questions:

- Do I have the expertise to make this decision alone? What are the consequences if I do?
- Do I have the authority to make this decision alone? How will this affect the team?
- Am I willing to get other team members' inputs and ideas on this decision?
- If so, what will I do with these inputs and ideas? Will I really take them into consideration? What happens if I don't?
- Is this a decision in which I need everyone's commitment to support?

Put it this way. If you need the team's commitment AND you do not have the expertise to make the decision alone (or doing so will have dire consequences), it might be the time to work on gaining consensus among the team's members.

Consensus Guidelines

- Get the right people at the meeting to discuss the issue. If the outcome affects the entire team and you want/need their commitment, ensure that the entire team is at this meeting.
- Ensure that enough time is allowed when you are striving for consensus as it is usually a longer process than just voting or making a unilateral decision.
- Use your communication skills during the meeting, especially LISTENING to team member's opinions. Consider each opinion carefully. Ensure everyone who speaks feels that they have been heard.
- Try to involve everyone in the meeting. Use open-ended questions to get everyone to participate.
- Be open to all possibilities. Strive for a creative solution.
- Use a flipchart to document all possibilities. Keep the team focused on the issue at hand.
- Do not let the team come to agreement too quickly! Ensure no one is avoiding conflict by easily agreeing with the majority.
- Guide your team to consider the impact of each possible option on the organization, the Project Management Plan and themselves.
- Ensure that once a decision or agreement is made all the team members are willing to support it. This means they will not leave the room and start bad-mouthing the team or the decision.

A Way to “Check-In” With the Team

Let’s say you are running a meeting in which you are working to gain consensus on a decision and it seems as if many team members are in support of one option. You can get a sense of where each team member stands by asking for them to show it by using their THUMB.

Ask the team to show where they stand on an issue by using the following guide:

THUMB UP = I am “for” this decision/option

THUMB DOWN = I am “against” this decision/option.

THUMB SIDEWAYS = This decision/option is not my first choice but I agree to support the team’s decision.

The goal is then, if true consensus is to be achieved, to get all the team members who showed a THUMB DOWN to change it to (at least) a THUMB SIDEWAYS.

Question:

 *What is the best way to do this?*

Developing an Options Paper

There are 2 major times to use develop an Options Paper:

1. At the beginning of the project when the schedule ends up too long or cost ends up being much more than the stakeholders requested.
2. During Project Execution when something “blows” up resulting in some baseline in the Project Management Plan no longer being valid — schedule, budget or scope/quality.

The Options Paper is a tool to use to get a group to come to a decision. It is a one-page paper summarizing the options and is to be used as the basis for discussion. During a crisis, a Project Team can develop an Options Paper and, if the option chosen is within their power to implement on their own, they should do it. Usually, in this situation, the option chosen does NOT have any significant impact on the Project Management Plan’s due date, budget or requirements.

On the other hand, if the crisis warrants that one or more the Project Management Plan’s baselines must be changed regardless of which option is chosen, the Project Manager will have to seek the stakeholders’ approval. Use the Options Paper to present the options to stakeholders — to maximize the possibility that the stakeholders will make a decision during the meeting so you and the team can carry on.

OPTIONS PAPER

Project Name:

Project Goal and Brief Description:

Brief Problem Statement:

“The decision to be made is.....”

Options: (2-4 maximum)

- Option A – list pros and cons or risks and benefits

- Option B – list pros and cons or risks and benefits

- Option C – list pros and cons or risks and benefits

The Project Team recommends Option _____.

Negotiation and Influence

What is Negotiation?

In essence, negotiation is the process of exchanging information, clarifying assumptions and identifying perspectives in order for both parties to arrive at an agreement regarding some issue that exists within a context of mutuality and tension.

In the world of most Project Managers, negotiation is an ongoing process.

“ A process wherein two or more parties with both common and conflicting interests come together to put forth and discuss explicit proposals for the purpose of reaching agreement. ”

American Management Association

What issues do Project Managers negotiate about?

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What makes negotiating difficult?

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What are the benefits of negotiating?

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What are some indicators of a successful negotiation?

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Attributes of a Successful Negotiation:

- It produces a “win-win” agreement, if agreement is possible.
 - It meets the legitimate interests of each side to the greatest extent possible.
 - It is durable. It will hold up and be honored.
 - It takes the impact and interests of the team, project, stakeholders and organization into account.
- It is done in an efficient and professional manner.
- It improves, or at least does not damage or destroy, the ongoing relationship between the parties.
- It results in a written, signed, mutually acceptable agreement (if applicable).

Key Points About Negotiation

- Aim high and expect the best! You will achieve more if you strive to have a positive and optimistic attitude about accomplishing your objectives.
- Hard negotiators are those that seek a special advantage. Soft negotiators are those who give in too easily. This dynamic usually results in a “win-lose” situation. In the business world, it makes good sense to strive for a “win-win” situation, especially if the business relationship is of an ongoing nature.
- Work to understand the other party’s perceptions. Discuss them at the negotiation. Try to see the situation from their side so you can better understand where they are coming from.

EXAMPLE:

A Team Member might feel that the Project Manager is cold and distant because he never asks her how everything is going. On the other hand, the Project Manager believes in allowing Team Members the space to do their jobs without “nagging” them. He trusts that they will come to him if there are any problems.

- Emotions can play a big part in a negotiation, especially in a bitter dispute. Use good communication skills to “hear” the emotions, acknowledge them as legitimate for them. Understand how the emotions might affect the negotiation.
- If a negotiation gets out of control, consider getting a mediator to act as a neutral third party to guide the parties to a resolution.
- Deadlines exist. Many times agreements are made just before the deadline. Think of what happens when the airline pilots or major league baseball players threaten a strike! Time is a powerful tool in project negotiations because delaying a decision or agreement can adversely impact the Project Management Plan (schedule, cost, quality). Use it to your advantage!
- It’s wise not to take every statement that the other party makes at face value. You can test them by simply asking “Is there anything that would make you consider changing this _____?” You can also indicate that you want to check the statement out with someone higher in the organization.
- Attend the negotiation with good intentions! Be clear. Be positive. Set your intention to come to a mutually acceptable agreement for BOTH parties. If there are personality issues lurking under the surface about the other party, the negotiation might not work out very well. Maybe someone else should be the negotiator.

A Project Manager's Sources of Power

“Power” is simply the ability to “act or produce” an effect. In other words, to get something done. If, as a Project Manager, you have the time, people, money, equipment, training to get the job done, then you will be seen as having power!

In a negotiation, or in just running the project and the team, it is important that Project Managers know what the sources of power are so that they can be utilized appropriately when necessary.

Positional Power

Positional Power comes in two forms:

- 1. The power that comes with one's position in the organization chart.**

Most of the time, the more “lines” you have coming out of your box on the organization chart, the more Positional Power you have. If you have lots of lines coming out of your box, you have lots of Positional Power. If you have NO lines coming out of your box (the situation for many Project Managers), you have little, if any Positional Power. In other words, the power is with the “box”, which can be one that allows you a lot of authority and decision making power, again, based on the “box”.

- 2. The power that comes from the organization being structured in a way that empowers Project Managers.**

In a fully “projectized” organization, Project Managers have a lot of positional power based on their decision-making responsibilities. Some of the responsibilities they have might include setting the project budget, temporarily acting as manager of the team members (and writing their reviews), determining the requirements and scope of the project, setting project priority and determining the overall project strategy, to name a few. In some organizations, the Project Managers are really “expeditors” of the decisions made by others. In this instance, they then have very little positional power.

Knowledge Power

Knowledge Power shows up in three major areas:

- 1. Organizational Knowledge**– This is the amount of knowledge you have about the way the organization really operates. Do you know who really gets things accomplished? Do you know how the system works? Bottom line, do you know how to get things done? It usually takes a while when you start a new job to understand the system, and then to understand how to get around the system when you need to get something done!! And of course, you must be able to do this without getting caught!
- 2. Technical Knowledge**– Do you know the technical aspects of your project? Are you the technical “guru”, even if the people on your team do the implementing? Do you understand the risks involved? If so, you have some Knowledge Power and thus leverage in a negotiation.
- 3. Project Knowledge**– Are you seen as the spokesperson on the project? Do the senior managers come to you for answers to questions about your project? Have you been involved since the project’s inception? If so, this increases your Knowledge Power and thus leverage in a negotiation.

Commitment Power

Commitment Power is built up throughout the project’s life cycle. It begins with getting the stakeholders involved in the definition process and then getting their signatures on the Project Charter and Detailed Project Plan. If you have their commitment, then you can hold them accountable for what they wanted and needed the project to be about.

Commitment Power continues to build by getting the Project Team involved in the planning process. Once again, if the Project Team creates “their project plan” and they and their immediate bosses sign off on it, you can now hold them accountable. Building up this commitment gives you more power.

If you did NOT get the Stakeholders and the Project Team involved at all, then you have not built up any commitment power. What motivates the Project Team to bring the project in when they said they will is their commitment and your ability to hold them accountable for it!

Influence Power

You might not have any control over how much Positional Power you have.

You CAN build up Knowledge Power over time.

You CAN build up Commitment Power by getting Stakeholders and the Project Team involved early on in the project.

But the source of power that is extremely critical in a project environment is Influence Power.

Influence is what you think you have until you try to use it!

Most Project Managers have people on their team that they don't "own", i.e., the team members do not report directly to the Project Manager and thus, the Project Manager does not write their reviews. Given this, a Project Manager's ability to get work done through other people who report to other managers directly can be a challenge.

Some people just seem to be born with the ability to get people to do what they want them to do. This ability is sometimes called "charisma". But can you develop your "charisma"? Can you learn some skills to be able to convince people to do what you want them to do, beyond just understanding what you are saying? Consider the following:

- The frequency in which people accommodate your requests is dependent upon how often you accommodate their requests of you. If you help people out when they need it, they'll be more likely to help you out when you need it.
- Are you seen as having good communication skills? Presentation skills? Negotiation skills? Leadership talent? Your skill level in these areas impacts your ability to influence people.
- Have you built a network of personal support within your organization? People who listen to you? Offer support when you need it? Understand your viewpoints? If not, start now! (Interviewing key Stakeholders is a good place to start!)
- Are you seen as persuasive by others in your organization? What is your influencing style? Are you able to adjust your style based on the situation at hand? Again, just as in leadership, your ability to stand back, assess a situation and its needs, and then adjust your approach in handling it, is key to your ability to influence others.

Your ability to influence others goes with you to any job you take in your organization or another. It stays with you wherever you go!

The Negotiation Process

Just like projects move through a generic life-cycle stage process, negotiations, too, move through a series of stages. They are as follows:

Preparation Stage

This stage consists of all the preliminary work that needs to be accomplished before the negotiation meeting occurs.

ACTIONS:

- Collect information about the issues from both sides' perspective.
- Determine your wants and needs and their wants and needs.
- Consider what you have to offer and what you want from them.
- Determine your "settlement range".
- Develop your strategy for the negotiation.

You also might consider spending some time with the other party and getting to know them better. Going out for lunch or dinner the day before the meeting might work. It is an act of "good faith" and letting them know that you are entering the negotiation with the desire of an optimal outcome/resolution for both parties.

Opening Stage

This stage occurs during the beginning of the negotiation meeting.

ACTIONS:

- Agree on how the meeting is going to be run.
- Define the ground rules.
- Agree on the purpose or goal of the meeting.
- Set the tone of the meeting.
- Decide on who will open the meeting (go first).
- Open the meeting, listen to their position.
- Other party responds with their position.

Exploring Stage

Once each party states their position, it's time to start offering and evaluating each side's wants and needs.

ACTIONS:

- Each side offers their information.
- The information is analyzed and initial offers are made.
- Offers are considered; counteroffers are suggested.
- New options are created and offered.
- Both sides work to close the gap between them.

Bargaining Stage

Once all the information, issues, offers and counteroffers have been exchanged, it's time to come to an agreement.

ACTIONS:

- Determine what is needed to come to agreement.
- Make final offers.
- This stage often begins when time is running out.
- Work to stay calm. Know what your "bottom line" solution is.
- Negotiate to an agreement that is, optimally, a "win-win" solution.

Closing Stage

Once an agreement is achieved, close down the negotiation.

ACTIONS:

- Document the agreement in writing.
- Discuss final details and next steps.
- Know that the negotiation is not over until the papers are signed by the appropriate people.
- Allow time for misunderstandings and rewrites.
- Acknowledge and celebrate your success!

Successful Project Team Characteristics

Every project team goes through cycles of good times and bad times. The duration of these times will vary for each team, depending upon how quickly they progress and work through the obstacles or problems. As a Project Manager, you should understand that such cycles are normal and are not an indicator of whether the team will ultimately be successful.

Below are some characteristics that, if a project team develops, will help the team move forward more quickly during the bad times and help ensure a greater chance of success.

- **Clarity of project goal and team purpose** – The best project teams work together to develop a clear understanding of goals and objectives, and come to agreement on what they are before beginning execution of the project.
- **Clearly defined roles and responsibilities** – Effective utilization of project team members' talents and skills leads to a cohesive unit. It also leads to a better understanding of each individual team member's duties and contribution to the team, thus increasing the respect and valuing of each other as project team members.
- **Clear channels of communication** – In order to effectively plan and carry out the project plan, effective communication is required. It is the responsibility of all project team members to use sound communication practices.
- **Problem solving and conflict resolution skills** – An effective project team will participate in the problem solving of issues and resolve conflict in a healthy manner. Much is dependent upon the Project Manager to facilitate these discussions.
- **Constructive feedback methods** – Again, the best project teams have methods to give constructive feedback in order to communicate anger, frustration and disappointment in a way that does not destroy relationships. Instead, the air is cleared, the issue is resolved and the project team moves forward.
- **Sharing of some roles (administrative)** – It is not up to the Project Manager to perform all the administrative roles such as publishing the agenda, taking meeting minutes, publishing minutes, watching the clock, flip-charting brainstorming sessions. A project team might consider rotating these roles in order to build participation and commitment.
- **Well defined decision procedures** – Most effective project teams decide by consensus, when possible, after having explored the important issues through a full evaluation of the available information. All opinions are heard and valued.
- **Balanced participation at team meetings** – All project team members have a stake in the outcome and should participate in discussions and decisions. Domination by a few team members should be prevented. Any team member can do this by soliciting the ideas and opinions of less vocal team members.

- **Awareness of the group process** – The project team should be aware of the group process, which includes understanding the way the team works together, along with paying attention to the content of the meeting. In general, project team members should be sensitive to nonverbal communication, recognize the group dynamics, intervene to correct a group process problem, and contribute to the group meeting content.
- **Valuing of all members and the skills and talents they bring to the team!** – Project team members demonstrate this through their behaviors and open, honest communication in their everyday interactions with each other.

Think of a project team you are on.

- ❓ *How would you rate this team against these criteria?*
- ❓ *In what areas is the team doing well?*
- ❓ *What areas could it use improvement?*

Most Important Points for Module 3

Jot down at least three of the Most Important Points you have gathered from this module. As the whole group shares its observations, you may want to add to your list.

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Module 4

Communicating Throughout the Project Lifecycle – A Reference Guide/Checklist

This module is intended to be a REFERENCE GUIDE (or checklist) to enable project managers to know, or at least question, what might be expected of them IN ADDITION to “delivering the widget”.

Project management is communication. It is managing stakeholders’ expectations. It is building relationships. As evidenced from the materials and learnings in this course, it entails much more than just “getting the job done”.

A tremendous amount of communication takes place during the four basic lifecycle phases of a project.

If any of what’s mentioned here is new or unknown to you, consider taking another project management course that addresses this topic(s).

The four phases that are addressed are as follows:

Phase	Name	Issue Addressed
1	Project Definition Phase	Answers “WHAT are we doing?”
2	Project Planning Phase	Answers “HOW are we going to accomplish it?”
3	Project Execution Phase	Entails executing to plan and “monitoring and controlling” to keep the project valid and on track
4	Project Closeout Phase	Cleanly wrap up the project

Here’s to experiencing the smoothest execution possible of your projects!

Communication during the Project Definition Phase

The Project Definition Phase consists of the work necessary to answer the question “WHAT is this project about?” and to develop the Project Charter as a result. Phase 1 tasks are performed to create a thorough project definition which will be documented in the Project Charter and then used to develop the Detailed Project Plan in Phase 2.

Many times when a project “fails” and a search is done to figure out “why”, the trail leads back to “inadequate project definition” as a cause.

In order to prevent, or at least minimize the disaster that can happen without a good project definition, consider performing the following steps during Phase 1.

(The assumption is that the team is already identified and in place and participates in this process.)

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Project Definition Phase

Have You:	Task
<input type="checkbox"/>	1. Acquired the cross-functional project team – including a “signoff” from their managers giving them the time to work on the project
<input type="checkbox"/>	2. Created (WITH the team) a list of “ground rules” – behavioral, task-oriented and email etiquette “rules”
<input type="checkbox"/>	3. Gathered all requirements <ul style="list-style-type: none"> • Identified the stakeholders surrounding the project – anyone “vested” in the outcome of it, including users (if applicable) • Performed a Stakeholder Analysis (to determine who the top 2-6 “key” stakeholders are – tools are available in classes or online) • Identified the “key” stakeholders’ needs and wants • Developed interview questions (open-ended, around 12) • Interviewed them • Reviewed interview results • Ensured all requirements have been identified
<input type="checkbox"/>	4. Produced the phase documents <ul style="list-style-type: none"> • Ensured that all stakeholders are in agreement about “what” the project is about • Written the Project Charter • Written (or obtained) the Product Requirements Document (if applicable) • Obtained approvals on the above documents (preferably “written” approvals) • Developed a Project Champion – someone with positional authority power who truly supports you and the project, and will go to bat for you if you get into trouble
<input type="checkbox"/>	5. Identified long lead-time items and decided on whether or not to purchase them early so as not to affect the timeline adversely later.
<input type="checkbox"/>	6. Held a phase exit review meeting to ensure all Phase 1 requirements are met and have obtained approval that the project can proceed to Phase 2.

Communication during the Project Planning Phase

Once the Project Charter has been approved, it is time to develop the Detailed Project Plan *with* the Project Team. The Project Planning Phase consists of the work necessary to answer the question “HOW are we going to do what we agreed to do (in the Project Charter)?” and to develop the Detailed Project Plan (or Project Management Plan) as a output.

If you haven't gotten the team involved yet, now is the time to do so. Remember – *teams support what they create!*

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Project Planning Phase

Have You:	Task
<input type="checkbox"/>	1. Conducted a “feasibility study” to ensure that the project is “feasible” (if applicable)
<input type="checkbox"/>	2. Chosen a project planning methodology – (WBS, Logic Network Responsibility Assignment Matrix, Estimating, PERT Diagramming/Critical Path Method)
<input type="checkbox"/>	3. Been trained in HOW to facilitate a planning session
<input type="checkbox"/>	4. Created ground rules for dealing with conflict (as the team will go into conflict during this planning)
<input type="checkbox"/>	5. Set a schedule for “planning the project” (this can range for 2-3 days offsite to a few “long meetings”) and informed the team
<input type="checkbox"/>	6. Created the first pass of the Detailed Project Plan
<input type="checkbox"/>	7. Refined the plan based on the customer’s “request” to meet a certain date.
<input type="checkbox"/>	8. If necessary, created options to present to the customer/stakeholders on which plan best fits their needs and wants (based on time and cost)
<input type="checkbox"/>	9. Finalized the Detailed Project Plan and obtained signature approvals.
<input type="checkbox"/>	10. Created a Communications Plan that includes, but is not limited to: <ul style="list-style-type: none"> • how communications will be handled with those “outside” the team • how information on project status (during execution) will be collected, analyzed, stored and distributed • how the team will communicate with each other
<input type="checkbox"/>	11. Had your core team members created their individual project plans (i.e., the Design Plan, the Test Plan, the Materials Plan, the Financial/Cost Plan, etc.) and obtained the appropriate approvals.

Communication during the Project Execution Phase

Approval of the Project Management Plan has been attained. Both the Project Charter and the Detailed Project Plan are a “go”. There is now a baseline with which to measure time, cost and performance against the “actuals”.

It is important to get the job done well, coordinate the tasks and the people, and basically keep the plan valid. In addition to keeping stakeholders informed on an *ongoing basis* of progress, risks and issues.

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Project Execution Phase

Have You:	Task
<input type="checkbox"/>	1. Held a Kickoff Meeting – Get all the stakeholders, team members and extended team members into a room and review the approved plan. The Kickoff Meeting is the beginning of the execution of the Detailed Project Plan. The tone of the Kickoff Meeting can start as informative, but it can end on a celebratory note. Acknowledge all the hard work and success of the team so far!
<input type="checkbox"/>	2. Decided if the team should sit together in a “project control room” (if team members are heavily allocated time-wise to the project)
<input type="checkbox"/>	3. Developed the team's communication methods – communication amongst team members and the team dynamics play a big part in how the project will unfold. <ul style="list-style-type: none"> • Come to agreement with the team on how to stay “in sync” on what's happening on the project • The methods used might differ for a co-located team versus a virtual team.
<input type="checkbox"/>	4. Developed templates (and a schedule) for status reporting: <ul style="list-style-type: none"> • From the team members to the Project Manager • From the Project Manager to the team (Summary Report) • From the Project Manager to Stakeholders • From the Project Manager to the customer (if applicable)
<input type="checkbox"/>	5. Created the best “time and place” to have regular team meetings
<input type="checkbox"/>	6. Shored up your meeting management skills – as the only time a team gets to feel like a team (and build camaraderie, trust, relationships) is at a meeting!
<input type="checkbox"/>	7. Understand the different types of decision-making and when to use each of them
<input type="checkbox"/>	8. Created a team meeting assessment template, based on the ground rules, to use “regularly” to get feedback on how the team (and meetings) are going
<input type="checkbox"/>	9. Learned how to facilitate a “re-planning” meeting when the project is off-track, along with an Options Paper in which to present options to Stakeholders on how to rectify the situation and get the project back on track
<input type="checkbox"/>	10. Helped the team or project out when they “get in trouble” – i.e., run interference for them when necessary.
<input type="checkbox"/>	11. Kept the project plan “valid” and kept stakeholders informed on a regular basis.

Communication during the Project Closure Phase

Every project, either after meeting its goal and objectives or being terminated before completion, requires closure. This is usually the final phase of the project life cycle.

It is recommended that in order to close the project out thoroughly, the following action items be completed.

DO NOT COPY

Project Closure Phase

Have You:	Task
<input type="checkbox"/>	1. Documented the product or service – This includes the collecting, documenting and compilation of all project documents, records and performance measurement reports. If a project archiving process exists, it should be followed.
<input type="checkbox"/>	2. Obtained acceptance of the product/service from the stakeholders – It is advised to make this <i>formal</i> , i.e., have a meeting or review. Ensure that <i>everyone</i> acknowledges that your project is over, according to the criteria in the Project Management Plan.
<input type="checkbox"/>	3. Held a “Lessons Learned” review meeting – Do this with your primary and extended teams. It is wise to capture the information discussed and compile it into a document that other Project Managers can review before starting future, similar projects.
<input type="checkbox"/>	4. Ensured that all contracts are closed out (as applicable)
<input type="checkbox"/>	5. Released people and equipment – Release team members back to their functions once the project is over. Any equipment, materials, or facilities that need to be returned to their rightful “owners” should also be returned at this point in time.
<input type="checkbox"/>	6. Given feedback on each team member’s performance – to them personally and/or their direct line manager.
<input type="checkbox"/>	7. Said “thank you” – to your team members. A WRITTEN note/email of appreciation can go a long way.
<input type="checkbox"/>	8. Celebrated project success with the team – Celebration is what gives the Project Manager and team members the motivation and incentive to reapply themselves to their next endeavor!

Module 5

Wrap-Up: Effective Project Leadership

Learning Objectives

At the end of this module, you will be better able to:

- Understand the team dynamics that effective Project Managers are trying to foster in order to create a highly committed team and more project successes
- Review some tips for creating positive team dynamics
- Return to work and implement some ideas/techniques/tips from this course

Effective Project Leaders

An effective leader in the project management arena is a person who not only accomplishes the goals of the project, but works to understand group dynamics and develops a team into one that is:

- Comfortable working with each other, establishing a real sense of camaraderie.
- Fully committed to the purpose and goals of the project.
- Totally involved in the team and project.
- Trusting, with no hidden agenda, or collusion between members.
- Focused on the present issues, not past issues.
- Sharing the leadership and the administrative roles.
- Able to solve problems and make good decisions.
- Loyal to the project, the team and to each other.
- Always willing to learn, grow and improve.
- Capable of making the project FUN!
- Committed to doing *whatever* it takes to bring the *right* project in on time, within budget, with high quality, while meeting stakeholder expectations!

Tips On Creating Positive Team Dynamics

Your ability to pay attention to the team dynamics is directly related to your self-awareness – how you operate, what impact that has on others, how to objectively assess your behavior, other's behavior and the situation at hand.

Review this list of things you can do to create more positive team dynamics and a committed, high-performing, spirited team. DO NOT overload yourself! Take it one tip at a time.

Practice it before you go on to using another one!

- Before a team meeting, set an intention to pay attention to the following dynamics, preferably only 1-2 at a time:
 - What is being said
 - What is not being said
 - The mood of the group
 - Each member's energy level
 - The body language of each member
 - Whether everyone is getting a chance to speak
 - If anyone is “checking out”
 - Whether the meeting stays on track

See if you can play “observer” to the meeting, even if you are running it. Document what you see. Decide what you will do differently at the next meeting to ensure that the behaviors creating a negative impact on the team dynamics are minimized or eliminated.

- Role model the communication skills:
 - Active listening
 - Giving and receiving constructive feedback
 - Paraphrasing
 - Open-ended questions
 - “I”- messages
 - Perception checking

Again, pick 1 or 2 to try and look for opportunities to use them! Also, notice which if any team members already use some of these skills!

- Take some time outside of the meeting environment to get to know the team members that you don’t know very well. This helps to build trust and the relationship. Encourage other team members to do the same.
- Invest in the leadership of the *group*; don’t become overly dependent on one person or do everything yourself!
- Focus on developing processes to create an agreed-to Project Management Plan, gathering information, making decisions, solving problems, communicating with stakeholders (Communications Plan, Status Reports, Options Paper, Stakeholder Plan).
- Provide honest, specific and timely feedback so “old stuff” doesn’t fester and “good stuff” gets acknowledged. Encourage your team to work any issues directly with the person involved rather than chatting about it to other people.
- Create and welcome “healthy” conflict. Focus on the problems, new ideas, the solutions, NOT the personalities.
- Help others in the group to develop their team skills and increase their awareness of the group process.
- Reward the team as a group and also as individuals when appropriate. It’s amazing what a box of donuts can do for a meeting!
- HAVE FUN! Create a positive environment! Your team can only control what it can control. Sometimes, you all just might have to go with the flow!

Action Planning

1. How can I use what I learned from this course when I go back to my job?

What can I implement within the next:

- 2 weeks?

- 2 months?

2. How can I use what I learned to help others?

3. Who do I need to update, brief or educate?

4. What additional training might I or my colleagues or team members need?