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**PROJECT LEADERSHIP ESSENTIALS**

**Course Worksheets**

**Dynamic Solutions**

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**PROJECT LEADERSHIP ESSENTIALS – PM151**

**COURSE WORKSHEETS FOR VIRTUAL CLASS**

**NOTE:** This document is designed to give you an easier time:

* doing the work in the breakout rooms (i.e. with a team) as you will have the information here to refer to , and
* to do the self-assessment exercises designed throughout the course (especially if you like to work “hard copy” on them).

So keep it handy!

**INTRODUCTIONS**

* Interview your partner using these questions:
  + ***Your position? How Many Years? (at Livermore?)***
  + ***BRIEFLY describe your project work.***
  + ***Previous Project Management trainings?***
  + ***The greatest challenge you face on your current projects?***
  + ***Your ONE Expectation for the course?***
  + ***What are you known for outside work?***
* Be prepared to introduce your partner.

**MODULE 1 – Leading in Today’s Project Environment**

**WHY IS 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 ? What did you admire about the leader(s)? Be prepared to give example(s).
4. What are some situations you face currently where developing your leadership skills would be a great benefit? What skill *specifically* would be of great benefit? Be prepared to give examples.

**EXERCISE: Flexible Leadership Styles**

1. Individually, reflect on an “issue” that your project team is experiencing.
2. Answer the 3 questions:
   * *What would be the “best” leadership style to use to address this situation?*
   * *What is your comfort level in using this style with your team?*
   * *What would make you MORE confident in addressing this issue?*
3. Be willing to share your answers.

**EXERCISE: Leadership Self-Assessment**

**Questions to be answered AFTER doing the assessment on the next page.**

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:

**Project Leadership -Skills and Stragegy Self-Assessment**

*Instructions: Read each statement and choose the number that most closely reflects your current level of performance using the following scale: 1=never; 2=seldom; 3=sometimes; 4=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 feasbile, 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 membersby 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 the employees’ 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** |

**MODULE 2 – The Ins and Outs of Communication Skills**

**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.”

1. “Since I was promoted to project manager, I worry about making the wrong decisions.”

1. “Just once I wish management around here would listen to the people who do the work.”

1. “They did such a good job selling; I don’t know if we can keep up with delivery.”
2. “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.”

**EXERCISE: Listening Self-Assessment**

Instructions: Read each statement and circle the number that best reflects the **frequency** with which you demonstrate each listening skill.

*1 = Never 2 = Seldom 3 = Sometimes 4 = 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. | 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 |

**Areas in which I listen well:**

**Areas in which I could improve my listening skills:**

**Actions I am willing to take to improve my listening skills:**

**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.**

1. State your Intention (and compliment, if applicable):

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

"My intention in speaking with you is… “

1. Describe the facts:

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

1. Describe the feelings:

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

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

1. Ask for what you want/prefer:

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

5. Ask for feedback:

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?

**Part 4: Debrief the Role-Play**

1. Observer shares the observations and feedback.
2. “A” comments on:

* how it felt to use this technique to share a communication
* what you did well
* what you could improve upon

1. “B” comments on:

* how it felt to “receive” the communication from “A”
* whether “A”’s intention for the communication came through
* whether you were motivated to listen and to participate in coming to a mutually beneficial conclusion
* suggestions for “A” to improve

**Part 5: Document your learnings**

1. What did you learn about yourself during this exercise?
2. Are you ready to take the situation in the role-play and communicate the feedback in “real life”? If not, what could you do to become ready?
3. Are there any other situations you face where using this technique might be useful?

**MODULE 3 – Understanding Team Dynamics**

**Team Spirit Harmonics** ©Used with permissionThe Plexus Team Spirit Guide*,*Dr. Barry Heermann,2003,p.10.

|  |  |
| --- | --- |
| **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  For more information, visit www.TeamSpirit123.noblepurpose.com . | *Unsupportiveness* – to act autonomously of others |

***Team Spirit* Exercise:**

1. Return to the page “**Common Team Problems**” 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?

**EXERCISE: Ways to Approach Conflict in Project Teams**

Assess the following 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:

**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.

**Delegation Quiz -** 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 allow your team members to make mistakes? |  |  |
| 2. Do you frequently take work home or work late hours? |  |  |
| 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, supervision and the “big picture”? |  |  |
| TOTAL |  |  |

**Scoring:** To determine whether delegation may be able to help you, 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.***

**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.

**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 is 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 is 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, and 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/team-management/delegation/

**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? \_\_\_\_\_\_\_\_\_\_\_\_\_

**Learnings about Delegation:**

* What did you learn from the exercises, video and discussions about delegation?
* How will this help you with your personal and professional growth?
* Are there any tasks you are doing that really should be done by another team member? If so, how do you plan on handling this when you return to work?

**EXERCISE: Decisions**

* Working with your group, describe an example of:
  + *Important decision:*
  + *Tough decision:*
  + *Important and tough decision:*
* Be prepared to explain why you categorized each as such.
* THEN **define “good” decision?”** One that….???

**EXERCISE: Negotiation**

* What issues do Project Managers negotiate about?
* What makes negotiating difficult?
* What are the benefits of negotiating?
* What are some indicators of a successful negotiation?

**Leadership Self-Assessment and Accountability Partnering:**

* **The areas that I excel as a Project Leader are:**
* **The areas that I could improve upon are:**
* **Some actions I can take to start making those improvements in are:**

**(think about 1-2 in the short- term (1-2 weeks) AND 1-2 in the long-term (1-2 months))**

|  |  |  |
| --- | --- | --- |
| **ACTION** | **Due Date** | **Status** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**My Accountability Partner is:**

**Name:**

**Email:**

**Phone:**

**Next check-in/meeting date (and who initiates the contact):**

**Action Planning**

1. As a result of this training, what do I need to do when I go back to my job, within the next 2-3 days?

Within the next few weeks?

1. Whom do I need to update or brief?
2. What, if any, courses do I need to sign up for next?

Other courses from Dynamic Solutions:

* PMFund010 – Introduction to Project Management Terminology (3.5 hours)
* PMFund011 – Project Management Overview (3 days – uses the PMBOK)
* PMFund012 – Managing a Project from Start to Finish (3 days – experiential)
* PM151 – Project Leadership Essentials (2 day)
* PM152 – Project Team Member Essentials (2 day)

Contact info:

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**MOST IMPORTANT POINTS:**

**Module 1:**

**Module 2:**

**Module 3:**

**Other:**