

PROJECT MANAGEMENT THAT WORKS

Real-World Advice on Communicating,
Problem-Solving, and Everything
Else You Need to Know to
Get the Job Done

RICK A. MORRIS & BRETTE McWHORTER

Documents

Copyright AMACOM A division of American Management Association International

Provided by IHS Market under license with AMACOM

No reproduction or networking permitted without license from IHS

Licensee=/, User=,

Not for Resale,

Full document details: AMACOM PROJ MGT THT WRK 2008

PROJECT MANAGEMENT THAT WORKS

This page intentionally left blank

PROJECT MANAGEMENT THAT WORKS

Real-World Advice on Communicating,
Problem Solving, and Everything Else You Need
to Know to Get the Job Done

RICK A. MORRIS
with **BRETTE McWHORTER SEMBER**

Copyright © 2008 by AMACOM

AMACOM

American Management Association

New York • Atlanta • Brussels • Chicago • Mexico City • San Francisco
Shanghai • Tokyo • Toronto • Washington, D.C.

Special discounts on bulk quantities of AMACOM books are available to corporations, professional associations, and other organizations. For details, contact Special Sales Department, AMACOM, a division of American Management Association, 1601 Broadway, New York, NY, 10019.

Tel.: 212-903-8316. Fax: 212-903-8083. E-mail: Specialsls@amanet.org

Web site: www.amacombooks.org/go/specialsales

To view all AMACOM titles go to www.amacombooks.org

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought.

“PMI” and the PMI logo are service and trademarks of the Project Management Institute, Inc. which are registered in the United States of America and other nations; “PMP” and the PMP logo are certification marks of the Project Management Institute, Inc. which are registered in the United States of America and other nations; “PMBOK”, “PM Network”, and “PMI Today” are trademarks of the Project Management Institute, Inc. which are registered in the United States of America and other nations; “. . . building professionalism in project management . . .” is a trade and service mark of the Project Management Institute, Inc. which is registered in the United States of America and other nations; and the Project Management Journal logo is a trademark of the Project Management Institute, Inc.

PMI did not participate in the development of this publication and has not reviewed the content for accuracy. PMI does not endorse or otherwise sponsor this publication and makes no warranty, guarantee, or representation, expressed or implied, as to its accuracy or content. PMI does not have any financial interest in this publication, and has not contributed any financial resources.

Library of Congress Cataloging-in-Publication Data

Morris, Rick A., 1972–

Project management that works : real-world advice on communicating, problem solving, and everything else you need to know to get the job done / Rick A. Morris with Brette McWhorter Sember.

p. cm.

Includes index.

ISBN 978-0-8144-0988-6 (hardcover)

1. Project management. I. Sember, Brette McWhorter, 1968– II. Title.

HD69.P75M6743 2008

658.4'04—dc22

2008011895

© 2008 Rick A. Morris and Brette McWhorter Sember

All rights reserved.

Printed in the United States of America.

This publication may not be reproduced, stored in a retrieval system, or transmitted in whole or in part, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of AMACOM, a division of American Management Association, 1601 Broadway, New York, NY, 10019

Printing Number

10 9 8 7 6 5 4 3 2 1

To all of the project managers struggling against the odds and trying to make a difference.

This page intentionally left blank

CONTENTS

List of Tables and Figures	xi
Acknowledgments	xiii
Introduction	xvii
Chapter 1 – Understanding Yourself	1
• DISC Profile	4
• Fostering Communication	7
• Responding to Types	7
• Working Through Weakness	9
Chapter 2 – Communicating on All Levels	11
• Determining Sponsor Styles	12
• Delivering Information	13
• Crafting the Message	14
• Team DISC Profiles	16
• Adjusting the Message	17
• Proper Communications Management	20
• Communications Documents	21
Chapter 3 – Be Trustworthy	27
• Coping with Questions	28
• Qualifying the Question	29
• Don't Lie!	30
• Dealing with Fear	31
• Admitting You Are Wrong	32
• How to Fix Things If You Haven't Told the Truth	36
• Sometimes It Can't Be Fixed	37
Chapter 4 – Turning Around Failing Projects	41
• How to Spot a Project That Is on Its Way Down	42
• Someone Isn't Being Heard	43
• Watch the Ego	46

• Stopping a Project Before It Starts	48
• “It Is What It Is”	51
• How to Assess the Current Situation and Create an Action Plan That Works	54
Chapter 5 – Defining the Word <i>Done</i>	57
• Definition of <i>Done</i> in Project Management	57
• Team Building with the Word <i>Done</i>	59
• How <i>Done</i> Can Set Proper Expectations	60
• Lack of Historical Information	61
• Creating Lessons Learned	62
Chapter 6 – Application of the Iron Triangle (Triple Constraint)	65
• What Is the Iron Triangle?	65
• Why the Triangle Works	66
• How to Implement the Triangle	69
• Use the Triangle for Discovery and Scoping	70
• Why the Triangle Shouldn’t Be Used for Project Success	72
Chapter 7 – PERT Methodology in Project Planning	75
• What Is PERT?	76
• PERT for Time Estimation	78
• How to Factor Risk into the Equation	79
• Create a Work Breakdown Structure for PERT	80
• Examples of PERT in Action	82
Chapter 8 – Customer Focus Starts with Great Requirements	87
• Characteristics of Good Requirements	88
• Functional Requirements Versus Technical Requirements	90
• Who Is the Real Customer?	92
• Work Breakdown Structure Dictionary	93
Chapter 9 – Do Not Sacrifice Your Team at Any Cost!	95
• The Importance of the Team Relationship	96
• How to Build an Effective Team Relationship	96
• Internal Team Satisfaction	99

• Team Building and Conflict Resolution	100
• 100 Percent/10 Percent Rule	101
• How a Team Can Become Overburdened	103
• Interacting with Requestors to Avoid Overburdening	105
• Dealing with Mandated Dates	106

Chapter 10 – Myths About Status Meetings 111

• Understanding the Purpose of Meetings	112
• Should There Be a Meeting?	113
• Are Your Meetings Effective?	114
• Setting Up a Successful Meeting	116
• Important Rules for Meetings	118
• How to Get a Meeting Back on Track	119
• A Big Meeting Faux Pas and Myth	120
• The Team Morale Killer	121
• How to Close a Meeting Successfully	121

Chapter 11 – Patriots and Scuds 125

• Dealing with Patriots and Scuds	125
• Understand Your Own Missiles	127
• Understanding Missiles	128
• Using Patriots	128
• Using Scuds	128
• Missiles in Public	129
• Missiles in Corporate Culture	130
• Always Have an Escape Strategy	130

Chapter 12 – A Real Risk Assessment 133

• Why Risk Is Important	133
• The Risk Process	134
• Why People Are Opposed to Risk Management	137
• Dynamic Risk Assessment	138
• The Beginning of the Transformation	141
• The Evolution of the Risk Assessment	142
• The Final Product	145
• Involving the Team	148

Chapter 13 – How to Put Risk in a Project Plan	151
• Thirteenth Floor Principle	152
• Parkinson’s Law	153
• Murphy’s Law	154
• Putting Risk in a Project Plan	155
• Presenting Risk to the Sponsor	160
• Presenting Risk to the Team	161
• Using Risk	161
Chapter 14 – Data Rules All!	165
• Collecting Data	166
• Mining Data from Lessons Learned	170
• Making Emotional Conversations Unemotional	171
• “Drop Everything” Does Not Mean Drop Everything!	174
• Using Data in Conflict Situations	175
• Countering Data That Is Harmful to the Project	181
Chapter 15 – Project Manager: The Strategic Resource	183
• Needing the Data	184
• Strategic Positioning of Project Management	185
• What CIOs Need to Know	186
• What PMs Need to Provide	187
• Software Assistance with Governance	188
• The Proactive Approach	189
Chapter 16 – Making Positive Change to Your Corporate Culture	193
• How Corporate Culture Affects Project Management	193
• Understanding and Analyzing Corporate Culture	198
• What to Do When You Can’t Change or Affect Corporate Culture	200
• How to Obtain Executive Sponsorship	202
• What to Do When Executive Sponsorship Is Not as You Hoped	204
• How to Get Your Sponsor Motivated and Interested in Your Project	207
Chapter 17 – Conclusion	209
Glossary	211
Index	213
About the Authors	219

LIST OF TABLES AND FIGURES

Table 1-1	DISC Profile	4
Table 1-2	Personality Types	6
Table 5-1	Top 10 Items Related to Job Satisfaction	60
Table 7-1	Critical Path	76
Figure 7-1	Network Diagram	77
Figure 7-2	Work Breakdown Structure for Painting a House	81
Figure 7-3	Alternate Work Breakdown Structure for Painting a House	81
Figure 7-4	Work Breakdown Structure for Installing Software	83
Table 7-2	Time Estimates for Tasks	83
Table 12-1	Qualitative Risk Assessment	135
Table 12-2	Risk Values	136
Table 12-3	Risk Assessment Questions	140
Table 12-4	Task Variance Log	142
Table 12-5	Old Versus New Assessment Categories	143
Table 12-6	Technology/Product Questions	144
Table 12-7	Completed Questionnaire	146
Table 12-8	Questionnaire with Formulas	147
Table 12-9	Total Risk Days	148
Table 13-1	Plan without Risk	156
Table 13-2	Plan with Risk	156
Table 13-3	Plan with Risk and Baseline	157
Table 13-4	Plan with Risk Deleted and Baseline Visible	157
Table 13-5	Plan with Linked Milestones	158
Table 13-6	Plan with Risks and Milestones	158
Table 13-7	Plan with Linked Milestones and Risk Removed	159

This page intentionally left blank

.....

ACKNOWLEDGMENTS

This book would not be possible without some key individuals that played a major role in my career development. To Dan Bailey for getting me started and teaching me the fundamentals of project management. To David Yother for giving a kid a chance. To Don Delashaw who helped show me how to enjoy myself and make project management fun. To Cary Blaes who taught me more about management than he truly knows and for being an exemplary leader. To my team at my first PMO: Renee Hyre, Reuben Russell, Courtney Huesman, Karl Cook, Pamela Smith, Pam Maher, Blair Liggins, Marie Todd, Diane Weldon, and Melissa Peterson. You all taught me so much and I was blessed every day that you let me lead you. To Mark Jones and my team at Highmark Technology for allowing me to follow and fulfill my dreams. I thank all of my teams, clients, consultants, and employees over the years. To my daughter Ramsey, son Remo, and, finally, my wife Stephanie—without you, none of this would truly be possible. You told me many years ago to go out and get a real job! Without you, I would not have found my calling.

...

This page intentionally left blank

PROJECT MANAGEMENT THAT WORKS

This page intentionally left blank

.....

INTRODUCTION

Welcome to a *Project Management That Works: Real-World Advice on Communicating, Problem Solving, and Everything Else You Need to Know to Get the Job Done*. The growth in project management is undeniable and is one of the fastest-growing occupations in the world. PMI® has seen membership growth of 1,000 percent in the last 10 years, with members in 157 countries. The membership continues to rise at a rate of 30 percent each year. The U.S. Department of Labor predicts explosive growth for the profession through 2014. Because this is such an exploding profession, there is a great need for a guidebook to help both new and experienced project managers improve their skills and procedures. This book is designed to do just that.

Roughly 7 years ago, I was part of one of the worst projects that I have ever encountered. I was always away from my family, was not excited about my job, and depressed. I was questioning whether or not I wanted to remain a project manager or choose another career path. I decided to walk aimlessly throughout a mall while I contemplated my future. I ended up in a bookstore and wandered over to the business section. I picked up a book called *Radical Project Management* by Rob Thomsett. It was a new take on some common project management theories and presented new ways of looking at managing projects. I was so enthralled by the book that I read it cover to cover right there in the store. It made a significant impact on me and how I manage projects. I decided to stay a project manager.

Reflecting on that time, I decided that I wanted to write a book that did more than just discuss proper project management techniques. Really, I wanted to write a book that was a culmination of the lessons learned, frustrations, and events that have been experienced throughout my career. This is that book. There is a significant gap between the principles of project management and the application of project management in many corporate environments. I often compare it to taking a driving test. We were all taught that your hands should be kept at 10 and 2 on the steering wheel, to signal a certain distance from a turn, and how to properly merge. Yet, almost all of us will break many of those rules when we get behind the wheel of a car. Project management is the same way. Trained project managers learn the principles and reasons for running a successful project. However, when it comes to running the project, we tend to selectively decide what we will and will not do.

Corporate culture and what it will mandate as process is another stumbling block in the path of the project manager. The executives will say that they want to have visibility into the enterprise, yet will not support time tracking to the task level. They want to be notified of issues and risks, but will not spend

the money on a system that allows single source entry and tracking. The opposite side of the scale is true as well. Corporations can become so process intensive that it prohibits any real work from being completed. This often leads a project manager to experience frustration and apathy.

There are plenty of books on the market that talk about the right way to do things or strategies that take the buy-in from the entire organization. There are even large corporate strategies such as CMMI (Capability Maturity Model Integration) or ISO 9000 (a standard for quality management), designed to offer guidance. However, the implementation of these strategies can sometimes miss the mark. For instance, I was at a company that was becoming ISO 9000 certified very early in my career and I had to attend a training class. The entire point of the training class was to instruct me on how to answer the auditor's questions. The answers were all centered on knowing where to find the processes I was supposed to follow. Essentially, if I could answer that my process is found in that manual over there, I passed. It didn't necessarily check that I was following the process, just that I knew where it was. This of course is not the intent of the ISO 9000 certification. To be fair, the certification is to ensure that consistent processes are being applied. The point is that the company was looking at the certification as a checkmark on their list of accomplishments or to make the company more marketable. They were not interested in truly changing the organization. Many of the books on the market require corporate buy-in or a corporate initiative to make the change.

This book is written for those who want to impact the way *they* manage projects. The overall result could be a change in corporate culture, but even without that level of support, *Project Management That Works* provides successful techniques that can be applied to any environment. These are not high level theories; they are tried and true processes and systems that have worked in a multitude of different cultures and environments. The book is intended for the project manager who wants to follow the principles of project management, but has been unable to bridge the gap between theory and practical application. Be ready to look at information differently; the theories in this book may not be the way that you currently do things today. Hopefully, you are seeking a different way and are ready to open up to a new perspective. Change is hard and some of these concepts are not quick fixes. They take time, diligence, and focus to complete properly. I promise you, though, these systems can and do work. I hope to be able to make the same impact for you that Rob made on me. At the very least, I hope to provide a tool or technique that improves you as a project manager.

At the end of one of my recent presentations, one of the attendees asked if I were able to go back to the start of my career, knowing what I know now, what would I change? The answer is simple. I would change absolutely nothing. The mistakes, stumbles, hard lessons learned, and issues that I have had to deal with on my project management path has made me the project manager that I am today. Each bump, lesson, or issue has taught me something different and provided me with opportunities to grow. Project management is truly a collection of

This book is laid out in a chapter-by-chapter road map to improving project management skills and resolving common project issues. The destination is great project management. Here is how the chapters work together to deliver superior project results:

- **Chapter 1 – Understanding Yourself** – First, find out who you are and how you will react to situations. How will your personality type filter the events around you? You can't manage a project until you can manage yourself.
- **Chapter 2 – Communicating on All Levels** – Be ready to communicate by identifying and investigating the personality types that are on the project team. Communication is the basis to all good project management.
- **Chapter 3 – Be Trustworthy** – Be truthful at all times. Projects are what they are and presenting the entire picture is important. If the project team can't trust what you say, then the rest of the concepts are useless. Laying a basis for trust will allow you to manage a project effectively.
- **Chapter 4 – Turning Around Failing Projects** – Learning how to turn around projects that are in trouble is an essential skill. This chapter shows how to make sure everyone is being heard and learn what has caused projects to fail in the past. Understanding the issues that cause project failure will ensure that new projects can protect from past issues.
- **Chapter 5 – Defining the Word *Done*** – Agreeing on what makes a project or portion of a project complete is another basic of project management. This chapter ensures that everyone is communicating on the same level and understands the vision and direction of the project.
- **Chapter 6 – Application of the Iron Triangle (Triple Constraint)** – Find out what is truly driving the project. Is it cost focused, resource constrained, or driven by a date?
- **Chapter 7 – PERT Methodology in Project Planning** – Estimate the unknown. Get better estimates at the task level to ensure that the total effort is understood.
- **Chapter 8 – Customer Focus Starts with Great Requirements** – Understand the requirements and ensure that the right people are a part of the definition.
- **Chapter 9 – Do Not Sacrifice Your Team at Any Cost!** – Protect the team and keep them out of harm's way. Watch the commitment level and ensure the quality of life.
- **Chapter 10 – Myths About Status Meetings** – Be productive with the project team's time. Run great meetings and make sure that they count.
- **Chapter 11 – Patriots and Scuds** – Avoid the normal meeting tricks and watch for sabotage.

- **Chapter 12 – A Real Risk Assessment** – Make sure that the time spent analyzing risks are productive and that they incorporate lessons learned from previous projects.
- **Chapter 13 – How to Put Risk in a Project Plan** – Protect the contingencies that have been planned into the project. They are for the project manager to manage.
- **Chapter 14 – Data Rules All!** – Bring everything together and present the data of the situation. Data, in the end, trumps all arguments.
- **Chapter 15 – Project Manager: The Strategic Resource** – Understand your role in the enterprise and assist in collecting data, monitor results, and help make key decisions in the enterprise.
- **Chapter 16 – Making Positive Change to Your Corporate Culture** – Utilizing the data slowly removes the emotional conversations from the corporate culture. Successful project management and successful projects leads to a positive change in the corporate culture.

Copyright AMACOM A division of American Management Association International
Provided by IHS Markit under license with AMACOM
No reproduction or networking permitted without license from IHS

UNDERSTANDING YOURSELF

There are a tremendous amount of business and leadership books on the market. Some of them will have a profound impact on the reader's life, but some can be dangerous as well. For example, a new manager, Keith, brought in a star employee (and current friend) for an impromptu coaching session. Keith had been watching his friend and noting several things in his life. In Keith's observations, he saw the employee start tasks (even personal goals) with great vigor and excitement, but noted he never seemed to follow through. Keith had just finished reading a book on how to motivate employees and was excited to apply what he had just read. He thought that all his staff needed was a conversation to light a fire under him so that he could follow through on the activities he had started. He wanted to discuss the employee's failure to finish projects at home as well as on the job. Keith launched into a monologue about how he had watched the employee start a weight-loss program, brag about how much weight he was losing, yet it looked like he had quit the program. He had also heard the star employee talk about

working with a charity, but hadn't heard any updates. Keith announced that he was concerned about the employee and felt he needed to learn how to finish what he had started. The conversation focused only on outside activities, not work-related items.

Later, after thinking about their discussion, the employee marched back into the office and angrily said that Keith didn't know what he was talking about. Yes, the employee had started a weight-loss program, but it required weekly office visits, which the travel requirements for his current position prevented him from attending. He had also started working with a charity, but due to work demands had to leave, but none of that had anything to do with his work. In fact, the new manager didn't mention it at all and just seemed to be complaining about a general failure to finish things. The employee said he was upset at the approach the manager had taken to discuss this, especially because they were also friends. Keith was stunned, but after he thought about the situation, he replied, "I'm sorry. I've been reading a new book on employee motivation, and I guess I didn't apply the concepts very well."

Keith was so eager to apply the points in the book that he failed to take several points into consideration. These issues included understanding why the employee had stopped some of the outside activities, what the current relationship was between the employee and manager, and the fact that his friend had never had a conversation like this with him before. Keith also failed to consider that as a supervisor, it was not appropriate for him to criticize choices in his employee's personal life, even if he thought he was being helpful. He failed to bring the conversation around to any work-related issues.

Another manager, Juanita, went to visit a profound and world-renowned speaker. The advice offered was very straightforward and tough. It was a great approach, however, it was not one that Juanita could see herself using. For instance, when seminar attendees asked how to motivate someone, the speaker would state, "You just tell them to do it. If they don't, you take disciplinary actions." When asked how to deal with unrealistic project completion dates, the speaker said that you just reset them. It was an almost arbitrary or matter-of-fact statement. When Juanita dug into the speaker's theories and background, she realized that he had been a high-level manager at his former company. He had instant authority in his position. Juanita was in an envi-

ply his principles because she did not share the same authority level or personality type. She could not employ the “do-it-because-I-said-so” communication type. She had almost no authority at all. She was hoping to learn how to influence teams to perform, not order them around arbitrarily.

These scenarios demonstrate that until you know who you are and how you react to a situation or event, you cannot possibly coach someone else in any effective manner. You are also less likely to craft a proper message that will be meaningful for them. Could the new manager have been more effective had he approached the coaching session with concern versus straight motivation? Can the seminar attendee find the core of the speaker’s message and apply it to her environment?

Communications are based on senders and receivers. Each shares responsibility for the communication. Understanding yourself (and your weaknesses) allows you to compose a more complete message by knowing your communication strengths and utilizing them properly.

It has been said many times that people’s strengths are also their greatest weaknesses. One manager’s strength might be that he can process information quickly in his head. The weakness is that sometimes his mind is processing information before the conversation or event is over, causing him to lose the intensity with which he usually listens, or causing him to miss some key information. Another manager’s strengths might be a passion for project management and for life. The resulting weakness might be that he or she can be overexuberant or even quick-tempered. It is important to be able to identify these traits in ourselves so that we can learn to manage them and optimize our skills, while downplaying or compensating for our weaknesses. It is only once we are able to manage ourselves, that we have any hope of effectively managing others.

Great managers take the time to understand how they will react in a situation and are honest in their evaluations so they can then learn to control and mitigate their weaknesses. When something bad happens and a manager with a quick temper can feel and recognize that inner fire in his chest, he can learn to take a deep breath and control his tone of speech. When a manager hears an update and someone is talking, he or she can wait to take notes until after the speaker is finished. Waiting to do this creates a fear that they might forget a point, and makes him or her concentrate harder and listen more intently than if he or she was

■ DISC Profile

The DISC profile was created by William Moulton Marston (Mr. Marston also created the first functional lie detector and the Wonder Woman comics). As the DISC profile has evolved, it has taken on many meanings, but for purposes of this book, we will use Dominant, Influencing, Steadiness, and Conscientious. The profile tests your personality characteristics and places you into one of the categories. Understanding which category you and your employees are in can help you become a better manager (Chapter 2 discusses how to use this profile with your team). Here is a much scaled-down version of this test. For one that’s more detailed, you can take a variety online. Whatever you do, take it (Table 1-1).

Please circle the description in each line that best describes you.

TABLE 1-1. DISC PROFILE

Category	1	2	3	4
Behavior pattern	Direct/controlling	Direct/supportive	Indirect/supportive	Indirect/controlling
Pace	Active/decisive	Active/spontaneous	Passive/relaxed	Passive/systematic
Inner need for	Power and control	Popularity and acceptance	Sincerity and appreciation	Accuracy and precision
Fears	Being taken advantage of	Loss of social recognition	Sudden changes and instability	Personal criticism of work
Security through	Control and leadership	Playfulness and approval	Friendship and cooperation	Preparation and thoroughness
Motivated by	Results, challenge, action, and the “win”	Recognition, approval, visibility, and the “show”	Relationships, appreciation, the “participation”	Being right, quality, the “process”
Major strength	Goal-oriented, gets things done	Enthusiasm, gets people motivated	Good people skills, team player or leader	Thoroughness, accuracy in analyzing
Major weakness	Can be insensitive to others’ feelings	Impulsive; may not focus on details	May sacrifice results for group harmony	Overly cautious; can be too thorough

TABLE 1-1. DISC PROFILE (CONTINUED)

Category	1	2	3	4
Teamwork	Initiates action, takes charge, works toward goals	Influences and motivates people to work together	Builds relationships, ensures follow-through, supportive	Focuses on details; offers technical skills and quality control
Time management	Focus: efficient use of time; likes to get to the point	Focus: tends to rush to next exciting thing	Focus: spends time in personal interaction	Focus: works more slowly to ensure accuracy
Decision making	Decisive, at times impulsive, makes decision with goal in mind	Intuitive; quick and spontaneous, lots of wins and losses	Relational, makes decisions more slowly, needs input from others, avoids risks	Reluctant; cautious, logical, thorough, needs lots of data
Communication	One-way; not as good a listener, better at initiating	Enthusiastic; stimulating, often one-way; inspiring	Two-way flow; a good listener	Good listener, especially in relation to tasks
Conflict style	Autocratic	Attacks	Acquiesces	Avoids
Sensitivity to the feelings of others	Tends to be insensitive; sees life as a battle	More sensitive to others, wants others to be happy, quick to offer support	Conscious of feelings, tries to avoid hurting others, avoids conflict and controversy	Task-oriented, takes a logical approach to feelings
Totals				

Now count the number of answers in each column. Column 1 is D. Column 2 is I. Column 3 is S, and column 4 is C. Whichever column has the highest score is your dominant personality type. There is a brief description of personality types in Table 1-2.

The following sections will help you understand how to use the information the chart has given you.

TABLE 1-2. PERSONALITY TYPES

Category	D	I	S	C
Basic motivation	Challenge and control	Recognition and approval	Stability and support	Quality and correctness
Basic desires	• Freedom from control • Authority • Varied activities • Difficult assignments • Opportunities for advancement • Choices, rather than ultimatums	• Prestige • Friendly relationships • Freedom from details • Opportunities to help others • Opportunities to motivate others • Chance to verbalize ideas	• An area of specialization • Identification with a group • Established work patterns • Security of a situation • Consistent, familiar environment	• Clearly defined tasks • Details • Limited risks • Time to think
Responds best to leader who	• Provides direct answers • Sticks to task • Gets to the point • Provides pressure	• Is fair and also a friend • Provides social involvement • Provides recognition of abilities • Offers rewards for risk-taking	• Is relaxed and friendly • Allows time to adjust to changes • Allows to work at own pace • Gives personal support	• Provides reassurance • Listens to suggestions • Spells out detailed operating procedures • Provides resources to do tasks correctly
Needs to learn	• You need people • Relaxation is not a crime • Some controls are needed • Sensitivity to people's feelings is wise • Everyone has a boss	• Time must be managed • Deadlines are important • Being responsible is more important than popularity • Listening better will improve one's influence	• Change provides opportunity • Friendship isn't everything • Discipline is good for us • Risk taking is sometimes necessary	• Optimism leads to greater success • Thorough explanation is not everything • Total support is not always possible

TABLE 1-2. PERSONALITY TYPES (CONTINUED)

Category	D	I	S	C
Needs to learn	• Self-control is very important • To focus on finishing well is important			
Perceived strengths	• Independent • Efficient • Practical • Determined	• Enthusiastic • Dramatic • Outgoing • Personable	• Patient • Dependable • Reliable • Agreeable	• Persistent • Organized • Serious • Industrious
Potential weaknesses	• Pushy • Dominating • Insensitive • Unreasonable	• Egotistical • Undisciplined • Manipulative • Talkative	• Awkward • Dependent • Slow • Fearful	• Moody • Indecisive • Moralistic • Picky

■ **Fostering Communication**

The information you learned from DISC can help foster the right kind of communication between yourself and your team. It will also help you learn how to craft messages and lead properly. How does knowing the DISC information help you lead more effectively? It starts with honesty. For instance, if you are a high “C,” one of your perceived weaknesses is that you can appear moody. If you are honest and look inside yourself, you will recognize the trait. Now that you are equipped with this knowledge, when a situation presents itself and you feel irritated or angry, your first step can be quick analysis. Ask yourself if this is a situation in which it is appropriate to be irritated (or are you feeling irritable and taking the situation out of context?). That simple step, that little realization could prevent you from launching a tirade that will only damage relationships.

■ **Responding to Types**

Notice how there are no shared traits between the columns in the entire “Responds best to leader who:” row? If you have a team of high “S’s,”

what would be their reaction if your messages were direct with pressure? Or if you had a team of high “D’s” and your messages were friendly or slow to make the point? One leadership type does not fit all. Determine the makeup of your team and then craft the message in the appropriate way that will speak to the individual personalities of your team.

For example, a project manager, Karen, was given an assignment that had been consistently behind schedule and team morale was low. The first thing she did was to perform a DISC profile of the team. Out of ten developers, nine of them were high “D” and only one was a high “S.” Referring to the DISC chart, she saw that the dominating drives for the team were “Challenge and control.” It was made up of individuals who, according to the profile, enjoyed difficult assignments, could be challenged, but liked the ability to make their own choices. If they did request a decision, however, they preferred a quick and decisive direct answer. Karen then looked at the past project information. She noticed that the communications were very collaborative and that meetings often had little or no agenda and tended to run long. She investigated the issue and risk logs and saw that they were continuing to grow, but very few were closed. When she started to talk to the team, she heard complaints about the former manager being unable to make a decision or being fearful to go out on a limb. Members also complained about what appeared to be a lack of project scheduling. The team often found themselves asking the project manager what to do next.

Armed with this new knowledge and understanding of the team dynamic, Karen put together a three-point plan:

1. She would hold a team meeting regarding the issue log and request that members bring their resolutions. The first meeting would be engineered to close as many issues as possible. The more difficult topics, requiring more analysis, would be assigned to a team member for resolution. Subsequent meetings were scheduled that contained the issues to discuss and the alternative solutions. These were set out in defined agendas with clear objectives for each meeting.
2. She instituted a daily task and progress log. She created an individual to-do list for each team member and requested feedback on what was completed on a daily basis. This list gave

3. She created a system that challenged the team to resolve outstanding issues, complete tasks, and provide assistance to others. It would reward the behavior that pushed the project to completion. Rewards could be as simple as giving a lunch coupon to the person that resolved the issue or special recognition at a staff meeting. She also instituted a “thank-you” policy that allowed team members to thank others openly in team meetings. This brought positive emotions to the project meetings and built a stronger collective team.

Instituting this plan, Karen found an immediate and beneficial surge of activity. Issues were being resolved, team morale was up, and the project was moving positively again. The key to the turnaround was understanding her team, finding an effective way to communicate with them, and enforcing their basic desires. Because they were high “D’s,” they wanted challenge and control. They also needed direct and to the point communications.

The previous project manager that was replaced in the above example was a fantastic at her job. She had a great track record and had never really experienced the kind of trouble that she had on this project. However, she didn’t know how to adjust her communication styles based on what the team needed to be successful. For a project manager, using one style to manage all projects is no longer useful. To be truly successful, you must adapt the way you communicate to your team’s needs.

■ Working Through Weakness

It is essential that you understand your own weaknesses. If you do not understand how you will react to a situation, then how can you expect to craft the proper message to your team? Once you understand your own weaknesses, you can learn how to work around them or how to improve on those areas. Look at the weaknesses this assessment has revealed about you and your management style and improve them or compensate for them. Take a look at the following examples:

High “D”: Understand that sometimes your determined and inde-

may need to learn to listen to others—and make it obvious that you are doing so.

High “I”: Understand that your enthusiasm and outgoing nature can make people think that you are egotistical or manipulative. A little self-deprecation can go a long way.

High “S”: Understand that your patient and agreeable nature can give the impression that you are slow and fearful. You may need to make the effort to be bold and decisive some of the time.

High “C”: Understand that a persistent and serious approach can push people to think that you are picky or moody. Projecting a positive attitude and learning to lighten up a bit can help.

These are not personality faults; they are *perceived* weaknesses. They too can be controlled with effort. We talked about the manager in the beginning of the chapter whose passion often resulted in the weakness of being quick-tempered. Someone who understands this about himself can easily feel the temper beginning to appear. When it does, he simply has a conversation with himself internally. In a flash of recognition, he is able to calm himself and take a measured response. Prior to attaining the knowledge, his behavior resulted instead in a quick blow-up, a recognized overreaction, and an apology.

There are multitudes of personality tests. Myers-Briggs and DISC have been the de facto standards. Make the time to take them. Be honest in answering the questions and find out who you really are. Some of the results will surprise you. If you take the time to understand yourself, then you have taken the first major step in real-world project management.

COMMUNICATING ON ALL LEVELS

Effective project management begins with an ego check. You must be prepared to take or give direction at any level of the organization. In every project, there is a primary owner of the project. This person provides the financial backing for the project and sets the initial requirements. This person is the project sponsor. There is no requirement, however, that he or she must be at a certain level of the organization. Your sponsor may not always be an executive. In fact, you may be assigned a new project to examine and procure new waste receptacles. Your sponsor could be the janitor!

Generally, a project manager (PM, as we will refer to him throughout the book) shouldn't even be on an organization chart. If anyone can be a project sponsor or stakeholder, then anyone can give direction on project activities. Essentially, the PM reports to the project sponsor and is accountable to the stakeholders. A stakeholder is anyone who is positively or negatively affected by the project. Therefore, the PM has a dotted-line relationship to all levels of the organization, not just to his or

her immediate manager. This means that to be truly effective, a PM must quickly be able to analyze, evaluate, and deliver messages in many ways to ensure the effectiveness of the communications. As a PM, you must be able to communicate at all levels of the organization.

■ Determining Sponsor Styles

Although anyone can be a project sponsor, for most PMs, the sponsor is an executive in their organization. One of the greatest things about being a PM is the visibility that you can have to upper management. Of course, on the other hand, one of the worst things about being a PM is the visibility that you can have to upper management. If your project sponsor is on the C-level (chief information officer, chief executive officer, chief financial officer) and you run a fantastic project, the direct visibility is priceless. On the other hand, if the project is poorly run and full of mistakes, it could end your career. The most difficult hurdle in working with an executive is determining his or her communication styles. Now, however, you have a new tool at your disposal: the DISC profile (see Chapter 1). Of course, you will not be able to walk up to the chief executive officer and ask him or her to fill out one of the questionnaires; nevertheless, you can observe his or her style. You can ask certain questions that help try to discern his or her type. For instance, consider the following questions.

- A simple question to ask is what type of status report is desired. If a detailed report is required that includes dates, costs, variances, issues, risks, etc., then he or she may be more of a high “C” whose basic desire is detailed reporting. You might be asked for a high-level report that shows overall progress, an indicator that shows the overall project status. This could lead toward more of a high “S” personality type. A high “I” type would rather have a status meeting or a conversation. A high “D” may just want an e-mail blurb.
- Observe style at the kickoff or status meetings. First, is he or she even there? If so, is he or she direct (high “D”) or listening and offering reassurance (high “S”) ? Is the stance more motivational or friendly (high “I”) or quiet, relaxed, and observant (high

- What is your overall opinion of the sponsor? Efficient and practical (high “D”) or moody and indecisive (high “C”)? Is he or she talkative (high “I”) or patient (high “S”)?
- When a decision is made, is the sponsor relational (high “S”) or reluctant (high “C”)? Is he or she decisive or even impulsive (high “D”) or more intuitive (high “I”)?

The key is to try to look over the profile and help discern which personality type is apparent. This will help you figure out how to craft messages for the sponsor. Be warned not to try to categorize anybody completely! Instead, use this information as a guideline to build your initial communication style as the two of you work together.

■ Delivering Information

Once you have determined the initial style of communication that will work best, begin to deliver information accordingly. The communications model calls for a sender to encode a message and send it to the receiver. The receiver in turn decodes the message and receives the communication. The model also calls for feedback that allows the sender and receiver to confirm that the message has been both sent and received. In the case of delivering the message, soliciting the feedback is going to be the greatest inclination of whether your chosen communication style will be effective. You must be ready to adapt and change the delivery method of your information should the feedback loop warrant it.

As an example, Chelsea was a PM who was assigned to turn around a failing project. When she arrived on site, the situation was analyzed, ideas were solicited from the team, and corrective actions were put in place. Chelsea was under strict orders from the client to solve the current project issues in 2 weeks or her company would lose the entire contract. The assignment was related to a support project in which the team was to resolve issues reported by the customer. On an average day, more issues were opening than could be resolved, causing a tremendous backlog. Her initial communication style was to prepare a daily report showing the number of issues opened, the number of issues closed, the cause of the issues by category, and a detailed plan to re-

initial report went out, the sponsor of the project requested a higher-level status report that would not show that level of detail. Chelsea obliged by creating a one-line e-mail chart that would show the high-level information. She solicited feedback from the sponsor again to which he responded, “I don’t see it.” She took this information to mean that he is not seeing the detail he needs. This occurred three more times when Chelsea changed the report and the sponsor stated, “I don’t see it.” Finally she asked, “What don’t you see?” It turned out that the sponsor could not actually see the message due to the use of a different e-mail program than what the PM was using, so the sponsor was only seeing garbled text. He literally could not see the report.

We will talk more about how Chelsea crafted messages and dealt with the sponsor later in this chapter, but the early portion of the story is to stress the feedback loop of your information that you deliver. Do not assume that the message is being decoded and accepted. You must solicit feedback to understand that the message has been delivered. Do not be afraid to ask qualifying questions such as, “What is this report telling you?” or “Is this report effective in letting you know our progress?” Make sure that you are properly decoding messages as well. If Chelsea had asked, “What don’t you see?” earlier, she could have saved iterations of the status reports.

■ Crafting the Message

Once you have refined your communication style, then you can make sure that you begin to craft a message properly. The following information provides some tips for communicating with different personality types.

HIGH “D”

The high “D” generally stands for *dominant* but can also be described as *direct*, *demanding*, or *decisive*. For this personality type, make sure you stay on topic. Do not allow yourself to carry on or to make broad statements. Communicating with a high “D” means that you should be to the point and give brief, yet direct messages. A high “D” has a basic desire to see results; therefore, you should craft your messages accordingly. You must make sure that you have the facts to back up any re-

sults that you deliver, however. Unwarranted comments or communications that you are unable to back up will frustrate a high “D.” Many dominant managers are a successful part of the business community. High “D’s” are known for their exceptional handling of obstacles, can provide guidance, and can lead an organization to success. Nevertheless, their directness can push away their employees or trample on an employee’s feelings. The high “D” wants direct metrics, factual representations, and brief but results-oriented communications.

HIGH “I”

The high “I” common definition is influence but can also be described as inspiring, impressing, and inducing. The influencer tends to thrive in environments that are favorable and friendly. They like to have more social interaction in their communications. The high “I” type does like detail in their reporting but also relies on social interactions as well. They are generally incentive driven and sometimes would rather discuss an issue than make a quick decision or take action on one. They operate more on instinct and the “feel” of a situation instead of a more focused weighing of the options. They tend to inspire their teams to action instead of directing them. In general, high “I” personality types often find themselves in some sort of sales or sales management position. They are generally positive and very persuasive. They would rather coax you to their side than direct you to make a decision. Make sure you always have some sort of personal interaction when crafting your messages to the high “I.” Don’t just send an e-mail with boring facts. Follow up with a personal phone call offering to discuss the details if he or she would like. A high “I” can have the tendency to become distracted easily, so make sure you do follow up with that phone call, or you may have to communicate the same information again.

HIGH “S”

The high “S” personality type usually means steadiness but can also be described as submissive, stable, and security oriented. The key to crafting a proper message to a high “S” is to allow for time for him or her to process the information. Create an environment that is friendly, but be patient in waiting for responses. Make sure that the communications are clear and balanced. Confrontational stances will only make the high

“S” uncomfortable and distracted while mentally processing the provided data. One of the dominating characteristics for a high “S” is their desire for a stable and predictable work environment. Generally, high “S” individuals enjoy receiving recognition for loyalty and dependability as well as appreciation for their contributions. When crafting messages for the high “S,” make sure that you communicate in a consistent manner. If you have bad news or significant changes, make sure that you craft a message in such a way that it is nonthreatening to the high “S.” Next, allow time for him or her to understand and come to a decision or comment. Make sure you protect the high “S’s” security and stability within the environment.

HIGH “C”

The high “C” personality type usually stands for *conscientious*. It can also stand for *competent, compliant, cautious, and calculating*. The most important factor to remember when communicating with a high “C” personality is that precision will count. Make sure that your communications are accurate and allow little room for interpretation. A high “C” tends to get lost in the details of a report, which can lead to slow or lack of decision making. They tend to control the details and always try to maintain a logical approach to project information. High “C’s” like to review recommendations in a logical and systematic manner. They like to create systems and make sure that the standards are followed. When communicating with a high “C,” ensure that you request and comply with their reporting recommendations.

■ Team DISC Profiles

As we said earlier, you are not normally able to walk right up and ask a chief executive officer to take a DISC profile. This is not true when you are managing a team, however. In fact, the DISC profile can be a fun and bonding team exercise. The first time you bring a team together should be at some point in the planning process. Before you begin to identify activities or create the work breakdown structure, administer a quick DISC profile. Take the time to understand the team dynamic, and make sure that you understand the communications needs of your team. Chances are that you will have at least one of every type on a

project team due to the nature of projects, however, some functionally organized teams will not. For example, the sales department usually is a grouping of high “I’s,” so although they may have a minority of team members with other personality types, the communications will still be greatly focused on satisfying the “I” type.

In projects, however, you may have equal distributions of types. Imagine a software development company that has a large project to launch a new product. To be truly successful, the team will need a combination of all of the personality types. A high “D” could set the direction of the product, while the high “I’s” find a way to market and sell it. The high “S’s” and “C’s” can create, test, and ensure the quality of the product. Together, they can create a unique product, sell it, and ensure customer satisfaction. The key is that each personality type is valuable to a team and has a role in a project.

After you complete the assessment of the team, the results could lead you to shift, replace, or increase resources depending on the results. If the key is balance, then make sure that you do not have an overwhelming majority of one personality type. There are types of projects when an overwhelming majority is acceptable, but that is a rare occasion. If you understand the personality types and the makeup of your team, then you can ensure that you are communicating with enough variety to guarantee the proper decoding of your messages.

■ Adjusting the Message

Learning how to adjust your message takes skill and practice and depends on learning how to identify and classify personality types. Great PMs can pick up the tendencies of their sponsors or customers and quickly adjust their message to elicit the response that they desire. Earlier in this chapter, we talked about the PM Chelsea who was assigned to a stressful project that was in need of a turnaround in 2 weeks. The project did not have a PM in the beginning, and now it seemed that there were more issues than the project team could deal with. The company decided they needed to bring in a PM to analyze the situation, create a plan that could appease the client, and implement the plan. The client demanded changes within 2 weeks. The initial meeting with the project sponsor was a disaster. This is an actual story from a PM’s experience:

CHELSEA (PM): “Good morning, it is nice to...”

SPONSOR (SPN): (Interrupts) “I don’t care what your name is or where you are from; your company is not performing, and I’m sick of it. Identify the issue or your company is out of here.”

PM: “OK. We’ll start our analysis and get back to you as quickly as possible.”

SPN: “Two weeks. We will see then. Now, if you don’t mind, I have other matters to attend to.”

Needless to say, Chelsea was quite distraught. What did she learn from this initial encounter? First, the sponsor was not very personable and gave direct and decisive commands. There was also a direct threat. Although it was a generalization, she could ascertain that she wasn’t dealing with a high “I” or a high “S.” Both of those types really enjoy the personal side of communications. They tend to want to socialize first before getting to business. This sponsor was completely about business. A high “C” can have the tendency to share risks or responsibilities, and they ultimately strive for consensus. Therefore, Chelsea decided she was dealing with a high “D” personality. She understood that a high “D” ultimately thrives on the power and authority aspect of being a manager. They like to take risks, make decisions, and dominate their environment. This also means that they hate to be wrong and their egos can be sensitive.

Chelsea worked with the team, and they quickly found the issue. As it turns out, the support issues were being created due to a change in the technology initiated by the customer. Chelsea’s organization was supporting an application that utilized a current version of mail software. The client upgraded the mail software without proper notification to Chelsea’s organization. According to the contract, if the customer changed the technology, then Chelsea’s organization would have an opportunity to test and certify the new application. The change occurred without certification, but because the support organization did not have a PM on the project originally, the proper change control procedures were not followed. This was the root cause of the support issues.

Chelsea still had the problem of more issues opening than could be closed, and now the root cause of the issues had been identified. She immediately put plans in place that would stop the incoming calls for

backlog of support calls. At this point, she had to be careful about how to craft the message back to the sponsor. Every part of her wanted to run into the office, announce how wrongly her company had been treated, and point out that it was his company that caused the problem. This may have felt good to her, but it would not have accomplished anything other than satisfying her ego. Following her deduction that the sponsor was a high “D,” she crafted her response and went to visit him.

PM: “I want to report that the issue has been identified, plans are being executed as we speak that will stop the incoming calls, and we are closing out the backlog of open issues.”

SPN: “Good to hear.”

PM: “We will not need the full 2 weeks to resolve the issue. We appreciate your understanding in this matter.”

SPN: “Hopefully you have taken measures to ensure this never happens again.”

PM: “We have, sir.”

SPN: “Is that all?”

PM: “Yes, sir.”

As she was leaving, she stopped and said one more thing.

PM: “One more thing, sir, our contract states that before any new technology is deployed in the environment that can affect our product, it must be certified by us. We are sure that we tested and certified it, but we don’t actually have a copy of the test results. Because I have just been assigned to this project, could you forward a copy to me? A formality, really. Have a great day and thank you again.”

SPN: “We will get it to you right away.”

The best part about this story is as soon as Chelsea said that, she could see the flash of recognition in the sponsor’s eye. He wasn’t aware that the issue had been on his company’s side. She was also pretty certain that he decoded her message. She was fairly certain that he understood that the certification document didn’t exist because they did not ask for certification before deploying, thus causing the issues. This story is a great example of crafting a message to a sponsor or executive by using what you can learn about personality types and adapting your

message to fit them. If Chelsea had gone into the office and accused, blamed, or acted indignant, the end result would have been the same as if she had never found the problem at all. Instead, she carefully crafted a message that allowed the sponsor to maintain his authority and kept intact his basic desires. The end result? The sponsor signed a new 2-year deal and expanded the scope of the support project.

■ Proper Communications Management

Communications management can be greatly misunderstood. Many PMs assume that a communications plan is a long drawn-out document. In actuality, it can be administered quite easily using nothing more than a spreadsheet. The key to great communications is to make sure that the pertinent information is given to the team members in a timely manner. There should be a minimum of five items that are communicated to a team on a weekly basis.

1. **Issues:** At a minimum, the next 2 weeks worth of issues should be communicated. It is up to the PM's discretion how many issues to show after the 2 weeks, but showing all open issues is the preferred method.
2. **Risks:** There are many different types of risks. There are some that the PM may or may not want to communicate to the whole team. Which risks are shared with the team is ultimately up to the PM's discretion, however, severe risks should not be withheld from the team unless they could disrupt or damage the team unity. Risks are scored a number of different ways. The most common way is impact (usually a cost or dollar amount) multiplied by probability (the percentage chance that it will occur.) Some systems use a weighted system such as 0 through 3 for impact and probability (i.e., high impact = 3, high probability = 3, risk score = 9). For example, a PM may open a risk because he or she feels that the materials necessary for the project may not arrive on time. He ranks the probability of this occurring as medium (2) and the impact on the project as high (3). His risk score would be 6 (2×3). Risk scoring allows the PM to rank the risks so that the PM can prioritize the list of risks. The PM should revisit each risk and risk score

on a weekly basis. The risk scores are expected to change from week to week as new information about the risk is revealed.

3. **Deliverables:** When an item is needed that does not appear on the project plan, issues, or risks, deliverables can be used. A *deliverable* is an item or activity that is not large enough to be on a project plan, consists of an issue or risk, yet still needs to be completed. For instance, “Joey needs to bring 12 copies of the user manual to the next meeting” is a deliverable. It is up to the PM’s discretion to choose what is tracked or shown in this section.
4. **Completed Items:** It is good practice to share with the team all of the completed tasks, issues, or deliverables from the previous week. This will allow for input on the validity of the completed items as well as share with the team what work was done. It also prevents having to go around the room to discuss completed items.
5. **Upcoming Tasks (2 weeks):** In this section, the PM lists the tasks from the project plan that are to be started or completed within the next 2 weeks. This is an important step from an awareness viewpoint and is a concise way to notify the team about upcoming tasks. Additionally, it creates awareness for the PM to understand what is expected to be complete in the next 2 weeks.

■ Communications Documents

At the beginning of each project, the PM should meet with the team to discuss the method and frequency of communicating the pertinent information. There are several document types that should be utilized throughout the project. Each project can vary in the use of documentation and communication methods. Following is a list of the common uses for each document.

STATUS REPORTS

Audience: Sponsors, stakeholders, project team

Frequency: Weekly

Purpose: Communicate weekly progress of project

Description: The status report is a snapshot of the project's progress for the prior week. It communicates the issues, risks, deliverables, completed items, and upcoming project tasks. It is intended to show weekly progress, as well as act as a vehicle to bring the core issues of the project to the forefront. All of the weekly communication expectations can be handled within the status report.

MEETING NOTES

Audience: Absent team members, project team

Frequency: As needed

Timing: As soon as possible after the meeting

Purpose: Documentation of what occurred in the meeting

Description: Meeting notes are intended to be a snapshot of what occurred in the meeting. They convey what decisions were made and document the discussions that take place. The main audience for this document is the team members that were unable to attend the meeting. Additionally, a historical record is created for reference. Some meetings require formal minutes, but this will depend on the type of project. In most cases, a synopsis will suffice.

MEETING AGENDAS

Audience: Project team

Frequency: As needed

Timing: One to 2 days before the meeting

Purpose: Prepare team members for which topics will be discussed in the meeting

Description: Agendas are intended to establish the meeting flow and ensure that all items pertinent to the project are discussed. The agenda should give the attendees ample notice of the expected update items and allow them to prepare their responses.

ISSUES, RISKS, AND DELIVERABLES LOG

Audience: Entire project team

Frequency: Weekly

Timing: As soon as possible after the weekly status meeting

Purpose: Communicate action items and issues

Description: Issues, risks, and deliverables logs can serve multiple purposes. These are itemized lists that require the PM's attention. They can help prioritize tasks and help communicate to the team the items' impact. Logs are not a required communication but are the most effective means of quickly updating statuses received in a weekly status meeting and communicating to the team what needs to be done.

PROJECT PLAN

Audience: Project team

Frequency: Weekly

Timing: Normally sent at the time the status report is sent

Purpose: Show current time frames and tasks

Description: Some team members and sponsors like to see the project plan. It is good practice to make it available to the team upon request or based on the communication plan.

TO-DO LISTS

Audience: Project team

Frequency: Weekly

Timing: Normally sent at the time the status report is sent

Purpose: Itemized list specifically for each resource

Description: It is good practice to send out the to-do lists to the project team members. This is an effective way to communicate what each resource will need to complete for the project. Many project team members dislike the project plan because it can be difficult to understand and the information is not concise. The project plan lists all tasks for all resources. A to-

do list contains the specific tasks for each individual resource. The list provides a focused view for each team member of what he or she is supposed to accomplish and when.

BUDGET

Audience: Project sponsor

Frequency: Weekly/monthly

Timing: As needed

Purpose: Communicate the financial status of the project

Description: Depending on the project, the PM may need to keep the financial records of the project.

COMMUNICATION PLAN ADMINISTRATION

The following steps should occur on each project to determine the communication plan:

- Identify the project team.
- Identify the types of documents that the project requires.
- Identify the target day for each document.
- Create a draft communication plan.
- Provide examples of each type of document and ask which documents the team wishes to receive and how often they wish to receive them.
- Document the responses on the communication plan.
- Execute the communication plan.

Proper use of the communication plan should eliminate issues with overcommunicating and undercommunicating with your teams. A sample schedule is provided:

- Wednesday: Status meeting
- Thursday: Updated issues, risks, and deliverables log
- Friday: Meeting notes, status report, to-do lists, budget
- Monday: Weekly status meeting agenda

The key to effective communications is timing. Issues and risks that are pertinent to a project's success should be communicated as quickly as possible. Allowing your audience to decide the way in which they wish to be communicated with is an important step for team building. For example, some team members like to see all project documents. Some team members may only want to see the project status report and not all of the other documents. Taking the time to show the team that you understand how busy they are and that you want to make sure you are communicating the right amount of information at the right time is a powerful way to show the team members that you care.

Copyright AMACOM A division of American Management Association International
Provided by IHS Markit under license with AMACOM
No reproduction or networking permitted without license from IHS

This page intentionally left blank

BE TRUSTWORTHY

To be a great project manager (PM), your team, stakeholders, sponsors, and peers must be able to rely on you. Trust is not given right away; it is earned. Unfortunately, the corporate world has taught many team members to not always be truthful. For instance, an executive may approach a team member in passing and discuss a task. At the end, he may ask, “Hypothetically, how long would this take?” The team member answers, “About 2 weeks.” Two days later, the team member finds out that he has been committed to completing the task in 2 weeks. At some point, the “hypothetical” became the actual. This is a standard problem for many people. The next time the team member is asked, he will be much more guarded with their response.

As situations like the one above transpire, teams learn not to trust management. They begin to pad their estimates to make sure that they are not painted into a corner. Then, the PM, wanting to account for risk, will pad the padded estimates given by the team and further inflate the estimate. By the time the sponsor sees it, the estimate is unrealistic from

her standpoint. This mistrust leads to the sponsor cutting the estimate by an arbitrary figure, such as ten percent. The next estimate from the PM will then try to account for the 10 percent that the sponsor cut, and a vicious cycle occurs. The team members don't trust management so they pad the estimate. The PM doesn't trust the sponsor, so he pads the estimate. The sponsor cuts the estimate in an effort to try to control costs, and the cycle continues.

This whole cycle is built on missing information. When supplied with an estimate from the team, the PM assumes that this is an estimate that has not accounted for risk. When the sponsor sees it, there is an assumption that padding is built in. Why are these assumptions made? For the most part, the cycle exists because the PM is padding because the team hasn't accounted for risk. It becomes common practice to assume what the other person is thinking.

How is it possible to break this practice? First, make sure you validate your assumptions by asking all of the necessary questions, communicate properly with the team and stakeholders, and tell the truth, even to a fault. This chapter explains how to take the right steps in ensuring that the information provided is always trustworthy.

■ Coping with Questions

Chris was an eager young man who was an on-site PM for a company. He reported to his supervisor and a sales VP. His supervisor managed his day-to-day activities while the sales VP was responsible for the client's overall satisfaction. His supervisor came in one day and asked Chris, "How's everything going?" Chris answered, "Everything's fine." The supervisor then went to a meeting about the project. When the supervisor returned, he was furious at Chris. "I thought you said everything was fine!" he shouted. Chris was aghast. "Everything is fine!" he said. The supervisor asked, "How can everything be fine when I just heard about four issues in a team meeting?" Chris thought about that. There were indeed four issues on the project, but he felt in full control of them. Therefore, he didn't disclose them to the supervisor. The supervisor and Chris then discussed the four issues at length until the supervisor was pacified.

The next day, the sales VP came in and asked, "How is everything going?" Remembering the run in with the supervisor, Chris said, "Well,

there are four issues that we are dealing with right now.” The sales VP said, “OK,” and left. Ten minutes later, Chris was called into a meeting room where the sales VP told the supervisor that she was concerned because there were four issues on the project, and it didn’t seem that the PM had them handled. Chris stated, “I do have them handled. You asked how things were going; I told you there were four issues.” The sales VP said, “Right, and I expect you to be on top of the issues.” The supervisor said, “Chris was on top of the issues, but it appears that we have a communication breakdown.”

Obviously, Chris was quite confused. He answered the question he was asked, and it got him in trouble both times. When he tried to adjust his message between the first and second encounters, he still got in trouble. How can he avoid these uncomfortable encounters in the future?

The answer is to qualify the questions.

■ Qualifying the Question

Qualifying the question means asking more questions to help determine the level of detail that the stakeholder needs. What you’re really doing is finding out what the stakeholder truly wants to know. For instance, when the functional manager asks the PM, “How’s everything going?” The PM can counter with the following questions: Would you like to know all of the issues that have occurred, or do you want to just discuss the ones that we don’t have resolution to?

That simple question can qualify what the supervisor really means. Originally, the supervisor was upset because Chris answered his question of how everything was with a response that everything was fine. There were two major assumptions:

1. Chris assumed that the supervisor wanted to hear issues that should be escalated or issues that did not have active fixes in the works, and so he stated that there were none.
2. The supervisor, on hearing that everything was fine, assumed that there were no issues on the project at all, resolved or otherwise.

Likewise, the supervisor could have asked a follow-up question such as, “So that means all issues are closed?” to qualify the response