

Succeeding in the Project Management Jungle



HOW TO MANAGE THE PEOPLE SIDE OF PROJECTS

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Succeeding in the Project Management Jungle

How to Manage the People Side of
Projects

Doug Russell, PMP

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Introduction

ON MY FIRST PROJECT as a manufacturing project leader, inside a company known for its paternalistic management style and for being a big early driver of the Six Sigma methodology, I was the ultimate micromanager. I trusted no one, checked on everything, wanted to make every decision. I exhausted both my team and myself. I generated the desired short-term business results but was so unpopular that I was “moved on to the next challenge” as soon as it was clear the project would succeed. No one counseled me in what I should have done differently. At that point, writing a book on how to get effective results through the use of so-called soft people skills would have been inconceivable to me. And, yet, here it is.

Succeeding in the Project Management Jungle is the product of more than twenty-five years of experience in the PM trenches, making mistakes, failing, learning, and succeeding. What I discovered along the way is that if you manage with your core principles in mind and put the people you work with at the forefront, you can create successful projects and even enjoy yourself along the way.

The last thing the world needs is yet another management process. The processes out there—Lean, Agile, Six Sigma, whatever—are fine as far as they go. But clearly they *aren't* enough, as organizations still scramble to find the magic elixir that will turn their dysfunctional, sputtering projects into high-performance machines.

The pain I have witnessed over the years as people struggle to survive in these situations has been amazing: people working more than a hundred hours a week, trying every tool and process in the world, going to all sorts of training; multihour project reviews held

as management seeks to help; late-evening meetings in the senior managers' offices trying to force success. Many frustrated project managers have lost their jobs and even their careers because they were unable to deal with the jungle. It doesn't have to be that hard.

In four corporations, in multiple locations and roles, and across diverse business areas, I have generated success with my project teams by using the principles described in this book. My people-centered approach to project management is a commonsense way to drive successful business results using whatever process is being touted at the moment. *Succeeding in the Project Management Jungle* will enable you to do the same.

I created TACTILE Management to encapsulate my ideas, not as another new tool that promises to be “the answer.” Your success will come from within and from understanding the needs, wants, expectations, and desires of the people around you: your customer, your management, and your team.

TACTILE Management is three things:

1. **A philosophy on the right characteristics of successful projects.** My seven characteristics—transparency, accountability, communication, trust, integrity, leadership that drives needed change, and effective business results—have worked for me. Your list may be—probably *will* be—different. But, in the end, if you determine the characteristics you value and lead through them, success will come, and not at the cost of your personal life.

2. **An acknowledgment that the expectations of people are as important as the technical requirements.** Although this may sound obvious, it contradicts the core beliefs of most technical managers. Ignore this lesson at your peril. Misread expectations can derail your project and your career faster than leaving out the latest desired functionality ever could.

3. **A simple, practical guide to dealing with the pitfalls that seem to pop up on virtually every project.** These project pitfalls are illustrated through in-the-trenches stories about real people and are accompanied by action items you can put into play *today* to get control of your runaway project—no cumbersome months-long colored belt training required.

In this book, we go step by step through the concepts you need to master these three areas. Those who understand these basic concepts have a much greater rate of success than those who don't. They don't live in a fantasyland of perfect projects, but, when they come to the bumps in the road, they have in place the team and the skills to maneuver around the danger zone.

First, in Part I, we discuss the hard realities of life in the modern workplace and the factors that go into creating the project management jungle you are up to your knees in right now. Then, in Part II, we examine in detail the seven characteristics of successful projects and how TACTILE Management will help you find your way out of the jungle to create that success in your own teams.

In Part III, we scale the Expectations Pyramid, explaining how to determine the expectations of each of your key stakeholders—your customer, your management, and your team—and why you need these essential skills to manage those expectations so that you can shape the environment in which you can thrive. In addition, we hear some real-life Tales from the Project Management Jungle, both successes and failures, using the seven characteristics of TACTILE Management to analyze what they did right or where they made a wrong turn. (Names and other identifying details have been changed occasionally at the request of the subject, but the issues faced and the decisions made are real. These are people in the weeds, just like you, fighting their way out.)

In Part IV, we go through the five process groups—initiating; planning; executing; monitoring and controlling (plus reporting, which is at least as important in my opinion); and closing—and examine how to avoid common project pitfalls as you navigate them while managing complex projects and diverse groups of people. In addition, an ongoing case study, “The Path Less Taken,” tracks two fictional project management teams, one with a traditional mindset and the other with a TACTILE viewpoint, from initiating through closing of Project Alpha Omega. You'll learn exactly what TACTILE Management looks like in practice in the day-to-day combat of the modern project management jungle. In Part V, we

show the happy results of doing a project the TACTILE Management way.

You’ve probably tried several different processes, each time hoping to find that mythical “answer,” and perhaps they’ve worked for you occasionally. But if, like most of us who’ve had to get out of our cubicles and lead, you’re still falling short too often and you don’t know why, try focusing on the *people* who drive your project. I believe that, if you follow the principles in *Succeeding in the Project Management Jungle*, you will find the success you’re looking for at work and discover the key to a balanced life at home, as well.

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PART I:

The Project Management Jungle

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CHAPTER 1

Welcome to the Project Management Jungle

IT IS 1:15 A.M., a Tuesday night like any other. A lone light burns inside a beautiful Tudor-style custom home on the edge of the Northwest Hills in Austin, Texas. Inside, yet another busy project manager struggles to complete his work for the day, entangled within the project management jungle. In this unrelenting, always-on, pressure-cooker environment, he juggles hundreds of e-mails per day, endless meetings that accomplish little, stakeholders with impossible expectations, and new problems that should have been foreseen before they consumed additional money, resources, and attention.

His two remaining tasks for the night are to finish up prepara-

tions for his monthly ops review with management, scheduled for the next morning, and to generate an approach on how to get his design and test functional teams to work better together. The two teams have been fighting with each other for weeks and are doing little real work to solve their issues. That meeting is tomorrow, as well, “sometime after 5:00 P.M.”

Down the hall, his two gorgeous children, five and three years old, slumber away. He guiltily resolves, yet again, to take them to the park on Saturday. Or perhaps it will have to be Sunday. He did at least spend a few minutes with them earlier that evening, tossing a small basketball, before they went off to bed and he off to his Mac. His wife, hoping to spend some time with him watching a DVD together, chatting about the kids, or talking about the possibility of a vacation, has given up and gone to bed.

He sends several e-mails and then, cursing to himself, realizes that he has misplaced a key notebook. Quietly, he slips into the master bedroom to check a stack beside the bed. He glances fondly down at his dozing wife as he finds the notebook and sighs as he leaves the room. He wishes there were another way to easily lead his large project group in the complex task at hand. *So many issues*, he muses. *Got to make it happen, though. Winners do what is necessary to win.* With one last look at his wife, he thinks firmly, *There will be time for catching up on all this when the project is over.*

His cell phone rings from the study. Frustrated that he cannot finish his current tasks, he hurries to answer. It is his Asian customer, full of questions about the latest status report. Wearily, he tries to explain. He can tell his customer is not very happy with the answers.

Forty-five minutes later—not really done yet—he stops for the day, noting e-mail traffic coming in from all over the world, including places where it is even later at night. Exhausted, he falls into bed, trying not to make too much commotion. He rolls over and almost immediately drops into sleep. The alarm will go off in four short hours, and he will do it all over again.

Sound familiar? *Welcome to the project management jungle!*

Escape Is Possible from the Project Management Jungle

You may think that immense stress and a large time investment are the price of success as a project leader. But there *is* another way. In the past few years, I have led multiple teams in several companies to success without working excessive hours and while experiencing much less stress than our friend here. This book will help you do the same on your projects without going to lengthy weeklong training classes or spending massive dollars on a new process.

Sadly, success in the project management jungle is too often *not* the end result of all the effort involved. Enter “project success rate” into a Web search engine and the results are disturbing, with many studies quoting success rates of only 30 to 50 percent. Of course, the majority of studies look at myriad teams in a variety of industries and applications, and each study has its own definition of success, making it hard to find a baseline for a clear picture.

Succeeding in the Project Management Jungle is aimed primarily at active project managers who work with knowledge worker teams. The term *knowledge worker*, of course, covers a lot of territory. After all, virtually everyone in today’s workplace works with some sort of data. We will focus on knowledge worker teams employed in information technology (IT), software, hardware, systems design, and other engineering or technically related applications. These professionals struggle in the project management jungle every day.

Read on to learn about five key factors that create this jungle environment. Then keep reading, and by the end of this book you will have learned how to thrive there.

What Creates the Project Management Jungle?

Billions of dollars are spent every year on tools, processes, and training. Leaders and followers work more hours than ever. More metrics with which to manage are being pumped out by the people staffing the tools and processes. So why is there not a higher success rate on team projects? “Just the way it is,” you say. “The

projects are hard!" Yes, they are hard, but a few key factors have become tangled together over time to create the modern project management jungle:

- ▶ Environmental pressures
- ▶ Process-of-the-month club management
- ▶ Global nature of teams
- ▶ Poor leadership training
- ▶ Lack of coherent direction from management

Environmental Pressures

The environmental pressures are daunting. Modern schedules are short, performance requirements are fluid and seemingly always increasing, budgets are shrinking, and the right people are expensive and hard to find. Project leaders cannot change any of this; instead, we must learn how to better deal with the reality we face.

Process-of-the-Month Club Management

In an effort to respond to environmental pressures, many organizational leaders latch onto the latest project management process fad as they cast about for a recipe for success. They adopt these new project management techniques in record numbers, hoping against hope that the new processes will drive improved results. Once upon a time it was Six Sigma; more recently, Lean and Agile are the rage. These tools and processes, and many others, are all fine and useful. New tools and processes may be different—perhaps even better—but tools do not provide solutions. Like a golfer who buys a new driver but cannot escape his same old swing, new project tools are frequently purchased and implemented within the same old organizational culture that employees cannot escape.

Many adequate tools and processes are available, and over the years I have used most of them. But I have found that the particular tools used are virtually irrelevant to any individual project's success. The real key is the way that the organization thinks and learns and the culture it creates through the use of whatever tools are implemented within teams.

The Global Nature of Teams

In technology fields, rare anymore is the team that is located entirely in one country, much less in one building. Technical people—often not the best communicators in the world—struggle with communication, roles and responsibilities, and cultural issues.

Time zone and distance differences make communications difficult. Roles and responsibilities are tough to describe, but, to put it succinctly, there is almost always a struggle about autonomy and control that rages between the nonheadquarters and headquarters employees.

Multicultural issues ultimately cause the most confusion, and a great deal of time and energy can be wasted trying to deal with them. Even seemingly innocuous factors cause problems. For example, many people like to illustrate various conversational points with analogies that are familiar to virtually everyone in their own country. Many times I have heard someone in the United States use a football analogy, for example, only to be greeted with silence from employees in China, Israel, and India.

Combining an accent on top of these cultural misconceptions makes for almost comical situations. Once, on a multinational call, a man from Ireland spun a detailed sports analogy involving a local football “club” and an exhibition against some “Febs” from “the mainland.” It took several questions to understand that the Irish were playing a team from England and that he most definitely did not like them (“Febs” being a particularly harsh name to be called).

Of course, there are more serious cultural differences. It is well known in techie circles that employees from the Far East often struggle, for a variety of reasons, to bring up problems that have occurred—perceived loss of face not the least among them. On the other hand, people from those cultures often view North Americans as pushy, while Israeli employees may view them as soft and indecisive.

Poor Leadership Training

Another factor feeding the project management jungle is that managers are not taught what it means to lead project teams so that the

desired business results can be achieved through people. As Larry Bossidy, chairman and ex-CEO of Honeywell International, says in the bestselling book (with Ram Charan), *Execution: The Discipline of Getting Things Done* (Crown Business, 2002): “The people process is more important than either the strategy or operations processes. . . . To put it simply and starkly: If you don’t get the people process right, you will never fulfill the potential of your business. . . . People process failures cost business untold billions of dollars.”

Once, many corporations put new and recently promoted managers through effective leadership programs. GE had such a program. Motorola and many others had them as well. Some, such as Boeing Aircraft, still do, but such training is not currently prevalent, in part because of the global recession. According to an Ambient Insight Research study, “The overall U.S. corporate training and education market has been shrinking at a small but steady rate (negative 2–3% CAGR [compound annual growth rate]) since the recession of 2000–2001.” What is needed is the mindset of a coach, who encourages, pokes and prods, and develops but doesn’t try to control.

A related issue is the lack of formal project management training in college for many technical managers. Often people come into the workplace, become very competent at some technical specialty, and are put in charge of a small group, then increasingly larger groups until they control entire projects. The ad hoc ways they managed their small teams (e-mail, spreadsheets) will at some point cease to scale up. Without an adequate understanding of the value of project management tools and techniques, they “just don’t understand,” says Arun A., a Texas-based post-silicon test manager for a major semiconductor company. And what people don’t understand, they tend to undervalue.

Lack of Coherent Direction from Management

Finally, there is a lack of coherent direction from above. The management leaders are often so caught up in surviving in their own jungles that they don’t learn the needed coaching skills that would

allow them to support their followers. Rare is the manager in the chain above you who actually mentors or coaches you, as opposed to micromanaging you.

The cartoon *Dilbert* has found great popularity by mining this vein of worker frustration with management precisely because it is so widespread. Almost everyone, unfortunately, can relate to it. Many project leaders miss the insidious interplay of these causes until they are well down a treacherous path that leads deep into the jungle, perhaps to emerge much later battered, bruised, and scarred for life.

TACTILE Management™ Defined

TACTILE Management was created in response to the question I often hear: “Why don’t all the great process tools like Six Sigma, Lean, Agile, and so forth work more often?” It is true that these processes are valuable and can enable success. I was the manufacturing manager for a product that achieved Six Sigma quality in a Motorola factory, and I have seen teams successfully use many process tools. I have also seen companies abandon process tools. Process tools work better with some teams than with others, even in the same company. My conclusion is that it takes more than just process tools to generate success.

The difference is that, in the cases of success, there is always someone in the trenches who not only uses the process correctly but also has the people skills to match how the process is implemented with the capability of the team and the organization. The successful project manager:

- ▶ Creates and implements a systematic approach (philosophy, if you will) for leading people, with certain key concepts and words synthesized into a value system that creates a positive culture and enables success for the team.
- ▶ Incorporates the expectations of key stakeholder groups—the customer, management, and the team—into solutions.
- ▶ Identifies and plans for potentially perilous situations on projects. Problems occur on all projects, successful and otherwise. But avoiding or minimizing the effect of project pitfalls

is key to successful completion, no matter what the process or tool might be. These pitfalls go beyond just the standard risks you might encounter.

- Project managers who master these three areas succeed far more often than those who do not. It is not that they don't have problems, but rather that when problems do occur they already have a cohesive team and an approach that enables them to weather the storm.

TACTILE Management is a people-based project management system. What does *people-based* really mean, you ask? Maybe a couple of quotes will bring this into focus. Rooted in my belief system is that “leaders can’t motivate anyone—they can only create the environment where individuals motivate themselves,” from Robert Townsend’s classic 1970 business book *Up the Organization* (Jossey-Bass, 2007). I also like this from Tom DeMarco and Timothy Lister’s *Peopleware: Productive Projects and Teams* (Dorset House, 1987): “Since 1979 we’ve been contacting whoever is left of the project staff to find out what went wrong. For the overwhelming majority of the bankrupt projects we studied, there was not a single technical issue to explain the failure. The major problems of our work are not so much technological as sociological in nature.”

The world of project management is a tough, hands-on environment that requires project managers to leave their cubicles and get into the fray. It is indeed a tactile experience. People who work on projects don’t have time for theory or weeks to learn yet another new process to get the job done.

The seven letters of the acronym TACTILE each correspond to a key characteristic of successful projects. Each term is defined later in this chapter and discussed thoroughly in Chapter 2.

- **T**ransparency
- **A**ccountability
- **C**ommunication
- **T**rust
- **I**ntegrity
- **L**eadership that drives needed change
- **E**xecution results

Attempting to create successful project teams through the use of squishy-sounding words like these is often derided as the use of soft skills. But the ability to get work done by understanding people is vastly undervalued in the project management world. As Marcia Silverberg, vice president of HR Strategic Initiatives for St. Louis-based Ascension Health, says, “Soft stuff *is* the hard stuff. Culture eats strategy for lunch.”

New processes and tools, with metrics and quantitative data—the so-called hard skills—are preferred by many project managers because they seem to provide actionable data and create the appearance of positive action when implemented. Managers who put these tools into place often only appear to be doing something useful. The last thing the world needs is another process that requires certification—these cult-like saviors of process, with guardians at the gate preventing qualified people from becoming project managers because they don’t know the secret password. Instead, we need commonsense solutions to the tough problems that occur on projects. I have no quarrel with these processes per se; they form valuable disciplined frames upon which projects succeed. But tool and process alone do not generate success. Six Sigma, Lean, Lean Six Sigma, Agile, Theory of Constraints, and similar programs may be great systems, but they are not enough. In TACTILE Management, the term *strong skills* is defined as the ability to use any robust process, such as Lean, Agile, or Six Sigma, combined with the ability to get results through people.

Strong skills are rooted in three concepts:

- ▶ Constant respect for all individuals, including individual contributors on the team, the customer, the management food chain involved in the project, and yourself, the project manager.
- ▶ Successful leadership through the people—customer, management, and team—involved, using whatever tool or process the organization deems appropriate.
- ▶ Conceptualized and articulated principals of leadership that are put into action. There are seven characteristics in the TACTILE Management system. Your own system may have more or less

than seven; remember that TACTILE Management is a roadmap, not a recipe. Check out Stephen Carter's *Integrity* (Harper Perennial, 1997) to better understand creating and implementing value systems.

Other important terms within the TACTILE Management framework include the following:

- ▶ A *team* is defined as individual contributors (the hands-on workers), project managers, senior managers, and the customer (in a different role) working collaboratively toward the same overall goal in an integrity-based common culture of transparency, accountability, communication, and trust, with leadership that enables execution of the desired business result.
- ▶ The *goal* for the team is more than just meeting the schedule, cost, and performance requirements. The larger goal for teams is always to grow the capabilities of each team member, as well as of the overall team, so that the team will continue to function at a high level long after the project manager has gone on to the next assignment.
- ▶ *Success* means meeting stakeholder (customer, management, team) expectations for schedule, cost, and scope while maintaining quality, as well as ensuring that the team grows in overall capability and is a more potent force than when you joined the team.

TACTILE Management is not prescriptive; it is more about creating leadership that implements values to drive the desired behaviors than it is about the process or the toolset used. This is powerful stuff, and it should not be immediately dismissed because it is not quantitative. There are data, however! As Donald Phillips recounts in his book *Lincoln on Leadership: Executive Strategies for Tough Times* (Warner Books, 1992), "Tom Peters reported in his research that the best, most aggressive, and successful organizations were the ones that stressed integrity and trust." Of course, virtually all organizations include values of one sort or another in

their mission statements, but there also can be a good deal of cynicism present within those organizations about those mission statements.

Within a few miles of my house in central Texas is a corporation, National Instruments (NI), that drives people-based values into its culture while generating strong business results. Per the corporate website, throughout its history NI has been recognized as a company that continuously develops award-winning, innovative products that help simplify the job of engineers and scientists worldwide. With off-the-shelf software such as NI LabVIEW and cost-effective modular hardware, for more than thirty years NI has transformed the way engineers and scientists design, prototype, and deploy systems for measurement, automation, and embedded applications.

Currently employing more than five thousand workers, NI truly has a people-based culture where information is shared and decisions include input from all those affected. The NI website says: “We maintain this fun and innovative corporate culture by recruiting the best and the brightest employees and motivating them in a work hard, play hard environment.” According to Rajesh Purushothaman, manufacturing director, and Mark Finger, HR vice president, Dr. James Truchard, cofounder of the company, in 1976, fostered this people-based value system and it permeates every decision that is made. In essence, the culture at NI—for a tenth straight year one of *Fortune* magazine’s 100 Best Companies to Work For—is all about maximizing the value of people.

And this culture generates strong business results. Per its website, NI grew revenue from \$1M in 1980 to \$820M in 2008. The September 2009 10-Q quarterly report showed that the company has \$232 million in cash, with no debt. NI has maintained 74 to 76 percent gross margins for twenty years. This is just one example that excellent value systems can generate great results both for businesses and for people. There are other examples of businesses that drive results the TACTILE way, and we will look at them throughout the book.

Succeeding in the Project Management Jungle

Enough background—you have a project to run. To thrive as a project manager, you must succeed in all three of the following key areas:

- ▶ Developing the Seven Characteristics of Successful Projects
- ▶ Mastering the Expectations of Key Stakeholders
- ▶ Avoiding Project Pitfalls

Developing the Seven Characteristics of Successful Projects

It is essential that you, as a project manager, develop the philosophical underpinnings of your approach to managing your projects. To blindly jump into leading any group of people without these underpinnings will leave you like a boat at sea without a guide to shore when storms come.

In my twenty-eight-year career as a design engineer, project engineer, manufacturing manager, program manager, proposal manager, manager of program managers, director of projects, and director of systems engineering and test with Motorola Inc., Intel Corporation, Overwatch® an Operating Unit of Textron Systems, and others, I have found seven characteristics essential for successful knowledge worker projects. Some are more important than others, but, for me, all had to be present to some degree for success to occur. And they were most effective when consciously developed, in the sense of development as the means of making something new, such as a product or mental creation.

Don't misunderstand me; there is no magic here. These seven characteristics are what I found to be essential. Your list might be shorter or longer. Here is a brief definition of the seven characteristics, all of which are discussed more fully in Chapter 2:

- ▶ **Transparency:** The project manager's ability to ensure that the team members are told the truth about organizational policies, business climate, and decisions that affect them

- ▶ **Accountability:** The project manager's ability to ensure that everyone on the team knows and executes his or her role, feels empowered and supported in that role, knows the roles of the other team members, and acts upon the belief that those roles will be performed
- ▶ **Communication:** The project manager's ability to ensure that needed information flows quickly and seamlessly to where it can be used with optimal efficiency
- ▶ **Trust:** The project manager's ability to promote one agenda for all team members—the team's overall goal—and to create a culture in which team members believe they are being told the truth in all interactions
- ▶ **Integrity:** The project manager's ability to show team members that a consistent set of values or beliefs is being used appropriately to make the correct difficult decisions; also, his or her ability to integrate the efforts of all involved on the project toward the common goal
- ▶ **Leadership that drives needed change:** The project manager's ability to plan and execute the appropriate culture change within the team to drive the actions required for the desired business results
- ▶ **Execution results:** The project manager's ability to blend the other six characteristics to produce the desired business execution results

Each of these seven characteristics is important in any action taken as a project manager. All of them, or your equivalent list, should be planned into any approach for leading a team.

Mastering the Expectations of Key Stakeholders

One of the old warhorses in project management is the triple constraints triangle (see Figure 1-1), where the three constraints shown are time, cost, and performance (performance is often also called *requirements* or *scope*). Altering any of these three constraints requires that they be traded off against at least one of the others.

Figure 1-1: Traditional Triple Constraints Triangle

All three cannot be improved simultaneously. For example, if you want to improve a schedule's finish date, you have to allow higher cost and/or lower performance. As is often done, *quality* has been added inside the triangle to show that quality is always required and cannot be traded off. Most project managers deal quite well with linear tradeoffs of these three technical constraints.

A Guide to the Project Management Book of Knowledge (Program Management Institute, 2004), more commonly referred to as the PMBOK® Guide, is the standard text through which the Program Management Institute (PMI) provides guidance to project management practitioners. The *PMBOK Guide* mentions that the expectations of key project stakeholders must be considered, but not how. *How*, of course, is the hard part and a key to succeeding in the project management jungle. Much complexity occurs when the expectations of your customer, management, and team are added on top of the schedule, cost, and performance technical constraints. Many project managers do not approach the problem this way, continuing to try to trade off the technical constraints, while either ignoring or caving in to the inputs from stakeholders. The inability to balance the expectations of the three stakeholder groups causes more project managers to fail than do schedule, cost, and performance issues.

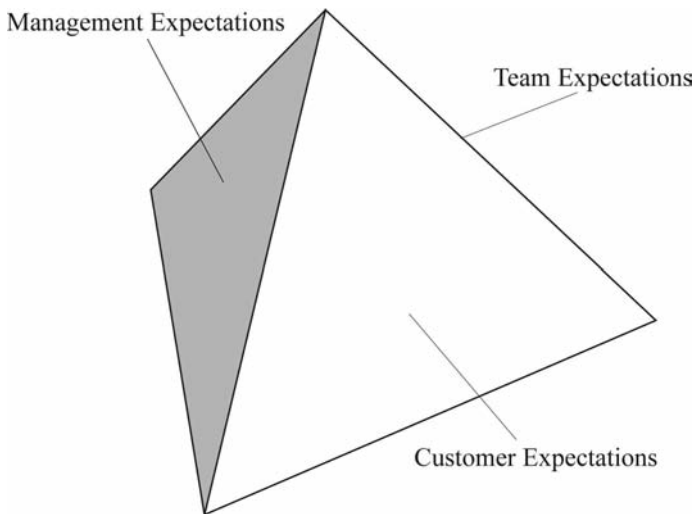
Instead of a simple triangle, I prefer a Triple Expectations Pyramid (see Figure 1-2).

As shown, each face of the pyramid concerns the expectations of one of the following: your customer, your management, or your team. Each face of the pyramid is itself also a triple constraint triangle, with schedule, cost, and performance (requirement or scope) constraints. *Successfully balancing these nine constraints simultaneously is what provides the environment within which a project manager can succeed.*

Success is not simply meeting the technical goals—that is, the schedule, cost, and performance goals that were given out early in the project. Leaders doggedly do so and yet subsequently fail to thrive in their careers. This is because they do not balance the expectations of their customers, their management, and their teams with the technical goals of the project.

More powerful is the leader who may not meet all the technical requirements but still somehow thrives. Often people ascribe this success to politics or to connections. Sometimes this is true, but often something more profound has occurred. Expectations are often unspoken and possibly not fully understood even by the person with the expectations. Possessors of high emotional intelligence have a leg up on the rest of us here. Anthony Mersino's def-

Figure 1-2: Triple Expectations Pyramid



inition of the term, presented in his book *Emotional Intelligence for Project Managers* (AMACOM, 2007), is helpful: “Knowing and managing our own emotions and those of others for improved performance.” Project leaders who develop high emotional intelligence are better able to simultaneously balance the technical requirements and these key stakeholder expectations in a way that satisfies all involved. *Develop* is the key word in the preceding sentence; turns out there is hope for all of us. This is because, unlike IQ, which seems to be fairly constant throughout one’s lifetime, EQ can be learned. Many executive business coaches focus heavily on EQ with their clients, often to good effect. Methods to improve your EQ are discussed briefly in Chapter 7.

After all, successful leaders care about what customers and project team members think, so it is natural that project leaders who can incorporate the expectations of these groups into their overall project solution will be valued. Think of the sports world, another area of intense pressure where high performance is rewarded and poor performance is visibly punished. Great coaches in the sports world also successfully create winning teams in chaotic, dynamic environments with a set of diverse stakeholders they don’t control. It makes sense that a leader is better appreciated if the leader can include the often-unstated expectations of these stakeholders in the final approach. Succeeding within the Expectations Pyramid is defined as *being able to balance schedule, cost, and performance goals simultaneously with the expectations of your customer, management, and team so that all parties are satisfied with the results.*

Grace, a project manager in a well-known technology company, was promoted to VP after she was able to master the Expectations Pyramid (not that she would describe it that way) on a project that was very important to her corporation and to the survival of the design center in which the project was located.

Grace took over a design center that had failed quite publicly on a previous project and was possibly in danger of being closed. Grace was able to leverage this expectation of (or at least concern about) closure into a huge personal commitment from the team. She also, for the most part, protected her design center—quite

remote from the corporation's Silicon Valley headquarters—from management's addition of desired functionality (scope creep) through a single-minded intensity and focus that convinced all parties that she would succeed. Chapters 3–6 show you how to master the Expectations Pyramid on your own projects.

Avoiding Project Pitfalls

The *PMBOK Guide* is a complex process-oriented document, not a how-to manual. PMI calls it “a standards and guideline publication,” with the primary purpose of identifying “that subset of Project Management Body of Knowledge that is generally recognized as good practice.” More than one project leader has joked with me that there should be a book titled *A Guide to the PMBOK Guide*. In a sense, that is what Chapters 7–11 of this book are meant to be.

There are five process groups within a project: initiating, planning, executing, monitoring and controlling, and closing. Most project people refer to these five process groups as phases. PMI frowns on that phraseology, rightly pointing out that each of these process groups is done throughout the project, not just during one period. To minimize confusion and needless wordiness, I will generally refer to each process group in one of two ways: for example, initiating or initiation, instead of talking about the initiation phase or the initiation process group. As mentioned in the Introduction, I have added reporting to monitoring and controlling in this book.

On every project, project leaders encounter certain common pitfalls as they try to meet the goals of the project. For example, pitfalls are encountered when creating the project charter in initiating or in choosing the appropriate change control process in planning. Pitfalls that affect initiating, planning, executing, monitoring and controlling (and reporting), and closing are discussed in Chapters 7–11. Mastery of these pitfalls will go a long way toward enabling your success. Chapters 7–11 also contain an ongoing case study that contrasts a standard project with one managed in a TAC-TILE way and offer practical tools that you can use on your own projects.

Now that you understand the philosophy at the foundation of TAC-TILE management, let's get more specific. Chapter 2 maps out the details you need to find your way through the jungle and end up right where you want to be.

PART II:

The Foundation of TACTILE Management

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CHAPTER 2

The Seven Characteristics of Successful Projects

I OFTEN USE PATRICK LENCIONI'S *Five Dysfunctions of a Team* (Jossey-Bass, 2002) as a way to illustrate how teams work (or don't work) in the real world. I once mentioned Lencioni's book during a conversation with a local engineering leadership educator. Her reaction was different; to her, the book is too negative. She thinks he should have written about what leaders should do, not what they shouldn't do.

The statement made increasing sense as I gave it some thought. I have long felt engineers and technical people are trained to be negative. As an engineer myself, I see that we spend much of our time looking out for what may go wrong, and, even when things

seem to be working well, success is never taken for granted. We just *know* there is an undiscovered failure in there somewhere!

Ted, a project manager in the western United States, was this kind of person. Ted worked with an overall program manager who resided in the Washington, D.C., area. Ted's program manager would take an early-Monday-morning flight two time zones away and arrive at Ted's plant in early midafternoon, tired and exhausted from the road. Ted, good engineer that he was, would greet his project manager at the door with the latest grim news and how it might affect the overall schedule and cost for the project.

Ted's timing aside, this is not always a bad thing. If a bridge falls down or an electrical device fails, people *can* die. Arguably, this focus may generate robust designs, but it is bad for the people involved, as they often become cynical, cranky, and unhappy—in other words, *burned out*. A positive approach to project management can help you achieve the goals of your project by showing you what works, instead of how not to fail.

The seven positive characteristics of successful projects listed in Chapter 1 form the philosophical foundation of TACTILE Management. These concepts are proven and have been applied successfully in several companies (including an insurance agency), on a variety of team types, and in several geographical locations. TACTILE Management is not a new tool or process that requires complex certification but a different way of thinking about the problems found in the project management jungle. No special colored belts or secret passwords needed here!

That's all well and good, you may be thinking, but maybe this question is nagging at you: *Why should I care?* I am well aware that people do not have time for unquantifiable concept words that do not drive results. I don't, either. After all, you are a project manager, with a complex project to run.

The question is a fair one, but here is a question for you: *Why should anyone follow your lead as project manager?* These days, knowledge workers are quite independent and readily move among companies, often because of excitement over a particular technology or project. They often are not direct reports to the project leader. The project leader cannot *make* them do anything. They

likely know far more about a particular area of expertise than the project leader, so you cannot count on controlling them with technical knowledge.

Here is an answer to both questions: to be effective as a leader, one must possess a set of values that drive the needed right actions. Leaders with large numbers of motivated and talented followers are successful because *they have and act on key values that drive results*. Not having bedrock beliefs upon which to make decisions allows the leader to be manipulated from all sides.

Having a set of common values makes good business sense to John Berra, chairman of Emerson Process Management in Austin, Texas. Emerson Process Management is a large component of the \$25 billion Emerson, a diversified global manufacturing and technology company, with more than 140,000 employees and approximately 255 manufacturing locations worldwide. In his role as president of Emerson Process Group (business leader is the internal name for the role), in 2004 Berra started a leadership development process that ultimately generated nineteen key competencies for leaders in his organization.

To drive the process initially, Mr. Berra sent a memo to the entire organization explaining what was coming. He then took a leadership team offsite and used the LEADERSHIP ARCHITECT Competency Suite®, licensed from Minneapolis-based Lominger International, to whittle sixty-seven competencies down to the nineteen key Emerson Process Group competencies.

The process has continued to this day. “It has become the language used internally,” Mr. Berra says, “for our high-potential candidate process.” A set of three leadership courses, attended by high-potential employees over a period of two years or so, accentuate business learning within the context of the key values. Real cases from Emerson history are used to anchor the desired concepts. The values also provide a general cultural foundation within the entire organization.

What were the business results? When Mr. Berra became the business leader, in 1999, the organization had sales of \$3 billion; when he moved to his current role of chairman, in 2008, yearly sales were in excess of \$6 billion. Mr. Berra cites this process as

one of the key reasons his business was able to grow at this rate while competitors struggled to do so. Simply said, good business results come from identifying, articulating, and putting into practice your key values. It worked for Emerson and also for National Instruments, as described in Chapter 1. It can work for you.

Now, let's look in detail at each of the seven characteristics that form the TACTILE Management philosophical foundation.

Transparency

The project manager's ability to ensure that the team members are told the truth about organizational policies, business climate, and decisions that affect them

The term *transparency* is used widely in the business and political world to convey openness and clarity, when just the opposite can be true. As Warren Bennis, author of twenty-seven books and a pioneer in the field of leadership studies, mentions in *Transparency: How Leaders Create a Culture of Candor* (Jossey-Bass, 2008), "Despite the promise of transparency on so many lips, we often have the sinking feeling that we are not being told all that we need to know or have the right to know." This understandably often leaves people quite cynical about transparency, but, for the leader, modeling transparency is the easiest, quickest way to start down the road toward a cohesive and highly functioning team. This is because the leader can start creating transparency the moment the team is first assembled. The other characteristics require more time and effort.

How to quickly create transparency? Just learn what the team cares about and communicate about those things. Team members desperately want information about what matters to them and care little about other information. Deducing what information is important to them can be tricky in an organization of introverted technical people! Often, they just want to know when the breaks will be, what snacks will be offered, and where the restrooms are.

To find out what your team cares about, start by making a list of what *you* care about. Then, starting with your staff or the key functional managers for the team, ask for input. Also have skip-

level one-on-one meetings with individual contributors (workers) below your staff or your direct reports. Do this in a relaxed, open way so that they do not feel pressure.

If you just cannot bring yourself to manage a probing interactive conversation, that's okay. This is not rocket science. People usually want to know about (1) how the business is doing overall, (2) how the local organization is faring in the ongoing corporate competition between sites, and (3) how the project is perceived by key stakeholders. In lieu of any information from the team members about what they want to hear, you can start with these three items and do the following:

- ▶ Share the information periodically in an all-hands meeting.
- ▶ Be ready between such meetings to answer team member questions.
- ▶ Dedicate a section of your staff meeting to those subjects.

How do you address sensitive areas such as potential layoffs or talk about project cancellations or site closures? These are the very subjects people want to know about, so you cannot ignore them. First, quote as fact only statements that have been made public through your organization's HR group. Start all answers with public information releases and then carefully (oh so carefully!) address areas of interest where you are on firm ground. Learn how to speak about them with truth and empathy—while protecting your organization—in a way that you would want to be communicated with, and you will be fine.

For example, many managers would refuse to address a question about a rumor about site closure. Paula, a project manager with high levels of empathy, got this exact question during an all-hands meeting at her location, far from the corporation's Chicago headquarters. Her answer: "I have heard nothing about a site closing, but of course the company has no requirement to stay here. To our credit this site shipped our new design on time, which is integral to the corporation's strategy on an important new product, so we are performing well. All we can control anyway is what each of us does and what we do as a group. Let's just keep doing it." She watched the questioner closely until she could see his body

language relax. Only then did she ask a question of her own, with an earnest look and a small smile: “Does that make sense?” When he smiled slightly and nodded, she maintained eye contact for another instant and then politely asked if there were more questions.

Project and senior leaders routinely express concern about talking too often and/or sharing excessive information with teams. They are worried about the time required and the distraction of too much information and fear that the team might not want to take the time for so much communication. Lest you as a leader listen to those concerns and do nothing about transparency, ponder this. If a leader is not transparent with a team about the things the team cares about, members will spend a lot of time filling in the lack of information with their own worries and anxieties and gossip. As a result, they will work less efficiently, as the following story illustrates.

Tom, a Texas-based project controls manager for a large global technology corporation headquartered in Silicon Valley, noticed the trouble his organization had with transparency (and several other things) during a period of reorganization. The organization held all-hands meetings using an Internet call-in system that allowed presentation on myriad personal computers worldwide, with an international call-in number for audio interaction. The calls usually originated from the corporate headquarters in San Jose, California. The frequency of these all-hands meetings increased greatly during the reorganization, as leaders tried to clearly communicate the process and the details.

The employees at Tom’s site would gather in a common room for the calls. To minimize background noise, it was traditional to mute telephones at the nonpresenting locations. As the corporate leaders presented information, Tom noticed just how *non-transparent* was the culture within the organization. With the telephone muted, people around the room would openly speculate on what the person speaking really meant in terms of reporting relationships, organizational structure, and similar issues. Occasionally, someone in the room would un-mute the telephone and ask a question, almost always in a seemingly polite nonconfrontational

way that reflected none of the feelings expressed when the phone had been muted. Tom quickly became aware that the managers in San Jose had little understanding of the real concerns and issues of the local employees. Discussion with peers at other sites revealed much the same feeling.

After the calls, many of the attendees at Tom's site, now thoroughly irritated and dismayed, would continue grumbling and rumbling through the halls on the way back to their cubicles. Those who went out to lunch—the calls typically occurred right before lunchtime in Texas—would continue to try to parse out exactly what was going on and what the presenters had really meant. Needless to say, a great deal of productive work time was lost to gossip and speculation. Tom's efforts to raise awareness around the issue went nowhere. Senior leaders were not uninterested; they were just under great time and task pressure and essentially did not know how to react to what Tom told them. The organization continued to lose a lot of productivity throughout (and after) the almost two months of reorganization.

Do not ignore transparency just because it sounds like something that needs to be done only on Wall Street or in Washington, D.C. You need to be transparent in all your interactions, lest your grumblers mute your input!

Accountability

The project manager's ability to ensure that everyone on the team knows and executes his or her role, feels empowered and supported in that role, knows the roles of the other team members, and acts upon the belief that those roles will be performed

Accountability is a misunderstood concept. Many managers act as if accountability means getting in the face of those who make mistakes to make sure they get the reaming they deserve so that they will not mess up again. Senior managers often tell project managers, "You are accountable for the project. I'll be coming to you whenever anything goes wrong." That is only half right. Accountability—to be effective—has to extend to everyone on a team. You as proj-

ect leader are accountable, but so are the team members and senior management (your management food chain). Management has a different role to play, certainly, but it cannot be completely distanced from the project and expect success.

Start the process of accountability early. Accountability is all about defining roles and responsibilities for each person on the team and holding everyone to them. In one of your first conversations with team members, tell them briefly how you are going to hold yourself accountable and what you, in turn, expect of them. A carefully chosen sentence or two is all that is needed.

Call a special staff meeting the first week you take over the project (or soon after project approval if a new project), and have this discussion. Be sure you discuss roles and responsibilities with newly assigned people soon after they join the team. Roger Connors and Tom Smith, cofounders of a leading firm for accountability training, discuss an “accountability conversion” in *How Did That Happen: Holding People Accountable for Results the Positive, Principled Way* (Portfolio, 2009). You must take these actions to create the right culture on your team. If you do not, some sort of team culture *will* develop, and it may not be the one you want.

Then have a project kickoff meeting to drive your desired culture. Include a brief discussion of your key values as they apply to executing business results within the team. You should plan on spending time teaching people how to provide accountability for themselves and others in a constructive way. There may be some raised voices along the way. That is okay. Once the right culture takes hold, you will have a powerful team. A culture of mutual accountability leads to winning project teams.

Communication

The project manager's ability to ensure that needed information flows quickly and seamlessly to where it can be used with optimal efficiency

I like a team communication exercise called helium sticks. Helium sticks are extendable to something like eight feet and, as you might guess, are quite light. The exercise involves lining up a group of

people shoulder to shoulder, with only people's fingertips allowed to come into contact with the stick. The stick is adjusted on everyone's fingertips until it is horizontal and then the team is told to lower the stick as low as possible without anyone losing contact with the stick and without the stick dropping down into a hook formed by fingers or into a palm so that it is more easily grasped.

The results are almost always the same: the stick *rises* and participants get upset with each other. Side by side, working on a seemingly simple task, and clearly motivated, why don't the team members work closely together to meet their goal? Team members mention the time pressure, confusion about the directions, concern that other teams are cheating, and their mounting frustration with their inability to get their helium stick to drop as reasons why they lose control of their emotions.

Welcome to the perversity of human communication! To be effective, you need to get people talking freely and openly about the right information. You do so by asking questions and actively listening. Spend some time putting yourself in their shoes and thinking like they do. Once you understand their needs and concerns, you will become a better project leader.

For Arun A., our post-silicon test project manager in the semiconductor industry, communication is an essential value. His team is responsible for testing the output of a design group. If the design group doesn't understand exactly what his post-silicon test group's capabilities and constraints are, the circuit may not be testable. If problems are discovered early enough, there may be no impact, but the later in a project they are discovered, the larger their impact on cost and the greater the time to fix them. Arun has found that driving a process of constant education back and forth between all involved parties (including internal customers) is required, and he starts this communication engagement process as early as possible.

For efficient communication to occur—in other words, for information to flow from wherever it is to wherever it needs to go—accountability must already be in place, certainly by Planning. If team members know each other's roles and what is expected of each person early on, they will also know whom to talk to about different issues. People normally do not know whom to talk to

about detailed issues unless this is the focus of someone in project leadership, and it is especially true on a large global project involving hundreds of employees in crash mode, that is, when many new people are being added all at once. If working-level followers cannot figure out whom to talk to about an issue, they will ask their immediate leader, who also may not know the details of other functional teams. In any case, working through a leader in this way wastes time and does not help followers learn how to work together. Your job is to get the team to work together so that needed information flows quickly and accurately. There is no time to waste.

To make all this work, your functional leaders and staff also have to learn to work together as a unit. Nick, a project manager with responsibility for a variety of different functions, taught his staff how to work together on real issues (he *didn't* send them to a class on team building) by changing the structure of weekly team meetings from boring recitations of the week's technical progress (or lack of it) to action-oriented discussions where participants explored—as a team—the solutions to issues that affected more than one function. The actions that ensued were then captured in SMART format: Specific, Measurable, Attainable, Realistic, and Timely. The assigned actions would be due sometime in the next week. Long-term issues were broken down into week-size chunks. The team began to work together, and Nick brought the project to a timely and successful conclusion.

The larger issue under discussion may take time to resolve, but people need short-term actions to galvanize and focus their efforts. Once your staff implements this approach, the managers in their organizations will begin to model the behavior within their teams, and you will be on your way to creating the culture you are looking for.

For more reasons than just good communication, you need to have weekly one-on-one meetings with all direct reports. The meetings are not a chance for you to beat them up or to tell them how to do their jobs but rather should be pegged to their agenda—what they want to talk about, factors that affect their ability to do assigned tasks or grow into new roles. The meetings should be

geared toward helping them learn how to lead more efficiently and thoughtfully, and you should be a model for the desired behaviors. Ideally, your direct report should talk approximately 80 percent of the time. If you are talking, you are not listening.

Your role is to ask the right questions and to offer advice and direction only after your followers have exhausted ideas on what actions need to be taken. Ideally, they should also be implementing 80 percent of the action items that arise during the meeting. You should help only with problems they cannot solve themselves. Be sure that the action items you do take are high priorities on your list of things to do, people to see, and places to go. That demonstrates, through action, that their needs matter.

Trust

The project manager's ability to promote one agenda for all team members—the team's overall goal—and to create a culture in which team members believe they are being told the truth in all interactions

Trust within the team is the ultimate goal for a project manager—actually, for *any* leader. Trust comes after the leader has been implementing the preceding characteristics in the TACTILE paradigm at least reasonably well. The team will grant trust as it buys into the overall plan.

Great things occur on teams when there is trust. This is why sports teams, as well as business teams, can improve dramatically when a change in management approach occurs, as opposed to simply introducing new tools and processes. An example of this in the sports world is what Mike Krzyzewski was able to accomplish with the U.S. Olympic basketball team at the Beijing Olympics in 2008 after previous coaches and U.S. national teams had under-achieved for many years. In *The Gold Standard* (Business Plus, 2009), about the 2008 Olympic experience, Krzyzewski relates his comments at the first team meeting. He said, “Two concepts are fundamental to a team dynamic: communication and trust. I don’t know how we can get beat if we communicate and trust.” And, of

course, they were not beaten, instead winning the gold medal in convincing fashion.

But this is harder to find in the knowledge worker world. Susan Lucia Annunzio, former adjunct professor of management at the University of Chicago's Booth School of Business and president and CEO of The Center for High Performance, and colleagues surveyed three thousand knowledge workers across the world for her book *Contagious Success: Spreading High Performance Throughout Your Organization* (Portfolio, 2004). One key finding was that in order for workers to perform at peak performance, they have to be treated well and trusted. But, sadly, Ms. Annunzio's study found that only about 10 percent of knowledge worker teams are managed in the high-performance ways that can lead to these results.

Dr. Ajay C., a computer-aided design (CAD) manager for a well-known company in Austin, relates an experiment in his organization in which a large design team was split into two teams, each with the same goal. Charles managed one team in a secretive, micromanaging way; the other was led by Mike in a trusting, open, and communicative style geared toward learning. Mike was willing to share much of what his team was doing with Charles's team and still won the competition, as he listened better to the customer and to his team. Since then, Mike's responsibilities have grown, while Charles's continue to shrink.

About thirty miles southwest of San Antonio is the small town of Devine. And divine (sorry!) it is to leave the traffic and congestion of the Austin-to-San Antonio I-35 corridor and break free into a relaxed rural environment. Devine, according to its Chamber of Commerce website, is the self-proclaimed avocado capital of Central Texas and home to about ten thousand people.

One of these residents is Mark Kidd, a client of my executive coaching business for a time. Mark owns the State Farm Insurance agency in town and has been a State Farm agent for more than thirty years. Mark's easy smile tends to disarm until you see the deep intelligence that lies within.

Mark's conference room is so covered with President's Club plaques and various other honors that there is almost no room on the walls for any new awards. According to Mark, in 2009 he and

his team achieved Top 250-agency status, chosen from a total of seventeen thousand total agencies nationwide.

But Mark doesn't just want to win; he wants to win the right way: "Doug, I don't need the money that comes from being a top agent. I want a winning team. I want [my employees] to share in the financial part of this thing; I want them to win a trip to somewhere fun every year. I want them to learn and become better every year."

This attitude is reflected in a high-performance life. Mark was a top student at Texas A&M and, interestingly, a member of the Singing Cadets there, a difficult and highly sought-after honor. Among his six (all college-educated) children are graduates of Harvard, Dartmouth, Emory, and Georgetown; another recently returned from Moldova after two years in the Peace Corps. Asked for the qualities to which he attributes this success, he says, "Hard work. I just outworked everybody. I hired you because you mentioned integrity in a clear way. Trust is important, too. People buy insurance because they trust me and State Farm."

Indeed, trust (and integrity, another TACTILE characteristic) is a key value for State Farm itself, as the State Farm code of conduct says: "Every day each of us makes choices where integrity, honesty, and trustworthiness come into play. . . . We all have a responsibility to exercise good judgment, honesty, and integrity when performing our jobs."

Mark has this to say about trust:

Some things in life are like doors that swing both ways; for me, trust is one of those. People need to know that I trust them as well as they need to know that they can trust me. Once trust is established, interactions between the trusting parties are generally interpreted as being for the common good and edification of all members. That allows everyone to move quickly through troubling and unsettled times. When my team knows that I have their back and I know they have my back, we can work very hard and take a lot of risk—if we start to fail, we know a teammate will be there to pick us up. Once a team builds trust, they operate at a level that is amazing. Trust is built by being authentic,

empathetic, and honest without regard to someone's personal net worth. Conversely, trust is destroyed by being duplicitous and aloof.

Mark and his team did all this in the small town of Devine, Texas. Next time you eat some guacamole, think of Devine and the Mark Kidd Insurance Agency. And think of the value of words like *integrity* and *trust*.

Integrity

The project manager's ability to show team members that a consistent set of values or beliefs is being used appropriately to make the correct difficult decisions; also, his or her ability to integrate the efforts of all involved on the project toward the common goal

If a team follows your leadership, it will do so largely because of two aspects of your integrity: (1) the set of values that encapsulates what you stand for and how you make decisions, and (2) your ability to integrate the individuals on the team into a whole to help them reach their goals by achieving the team's common goal.

Integrity, along with transparency, might seem the squishiest of the squishy here. A couple of quotes may help you see it for the core strong skill it really is. As mentioned in Stephen Covey's *The 8th Habit: From Effectiveness to Greatness* (Free Press, 2005), Dwight Eisenhower, leader of the Allied Armies in the Second World War and thirty-fourth president of the United States, said, "The supreme quality for leadership is unquestionably integrity. Without it, no real success is possible, no matter whether it is on a section gang, a football field, in an army, or in an office."

Frances Hesselbein, CEO of the Leader-to-Leader Institute, couldn't be more different physically from the image we have of the imposing Eisenhower, but both see integrity in a similar way. Jim Collins, author of *Good to Great*, in the foreword to *Hesselbein on Leadership* (Jossey-Bass, 2002), states Hesselbein's cardinal rule: "If your leadership flows first and foremost from inner character and integrity of ambition, then you can justly ask people to lend themselves to your organization and your mission."

Integrity is also important to John Berra, chairman of Emerson Process Group. He talks frequently about integrity, but, perhaps more important, he models his personal sense of integrity on the quality of being *human* and on being approachable to his employees. He also uses global all-hands webcasts to drive information and consistent values throughout the organization. As he says, “The following is not original with me, but I like to say the pope has to be more Catholic than anybody else.”

A code of personal integrity found in twenty-one major religions, the Golden Rule says: “Do unto others as you would have them do under you.” Sally Crowell, president of Crowell Systems, a software company in Charlotte, North Carolina, says, “We built our business on the Golden Rule, and these principles have always resulted in satisfied customers and led to numerous referrals. Honesty, integrity, and looking out for the client’s best interests are key. We always go the extra mile with service. For example, one of our clients sent us a dead server that was literally full of water, rust, and mold. The hard disk had crashed. The client’s whole business and patient’s medical records were on it. He could not access any of the data. Our technician poured the water out of it and worked hard to reboot it. Fortunately, he was successful. He worked for several days trying various methods in an effort to recover the data. Finally, he was able to retrieve the information. It was a huge save for the doctor.” This is another example of how integrity is not just a squishy concept but is key to so much of what makes a business valuable to its customers.

Establish your own set of business values based on your personal integrity. You don’t have to advertise your beliefs, because actions speak louder than words. In fact, it will be counterproductive if you do. Do tell your teams what your beliefs are, but then model those values in your actions and decisions. Your teams will follow you consistently, and this will generate better business results.

There is a second aspect to integrity. Yale Law professor Stephen L. Carter quotes from the *Oxford English Dictionary* in his book *Integrity* (HarperPerennial, 1997): Integrity is “the condition of having no part or element taken away or wanting; undivided or

unbroken state, material wholeness, completeness, entirety.” This is why the final step in putting together complicated systems, like spacecraft or microprocessors, is called integration. Even the toughest no-nonsense data-only engineering manager appreciates the value of integrity in the sense of wholeness and purity of integration.

These two meanings of integrity—*ethical/moral rules to guide decisions* and *wholeness*—taken together provide the glue that binds the previous four characteristics. You will fail if you try to implement the other characteristics without having thought out your own personal sense of integrity and without understanding that your job is the integration of individuals into a team. This is often why the introduction of new project management processes and tools fail to provide the desired results.

Leadership That Drives Needed Change

The project manager’s ability to plan and execute the appropriate culture change within the team to drive the actions required for the desired business results

Good things in life do not happen without some sort of plan, certainly not on complex endeavors like a modern knowledge worker project. To make all these abstract concepts work on your team, you must plan how you are going to make it happen. That is where leadership when making culture changes comes in.

First, evaluate how much culture change is actually required to be successful. This is not a one-size-fits-all process; in fact, the greatest value in this approach comes from its flexibility. If you are taking over an existing team, ask these questions:

- ▶ Does the team have an overall team goal?
- ▶ What are the structure and agenda of staff/team meetings?
- ▶ Are all-hands meetings occurring? If so, what are the agenda and periodicity?
- ▶ How does important information move around?
- ▶ How does important information get to the project manager for monthly operations reviews with management? How

effectively is that information communicated to management? What does management do with the information?

- What is the approach around schedule and cost control and around metrics, headcount, and risk management? Who owns the updating of this information?

Decide which of these areas you want to change first (I suggest the overall team goal as a unifying theme), and integrate that change into an approach that incorporates the previous five TACTILE characteristics (or your own set of values).

Execution Results

The project manager's ability to blend the other six characteristics to produce the desired business execution results

Generating solid business results is why we do what we do, right? The six characteristics previously discussed, if planned and executed properly, will lead to the execution results your organization desperately craves. Knowledge worker teams do not want to hear these squishy words, so don't talk much *about* the words but, rather, *use* them as the basis for how work will get done.

In the next section, we look at using TACTILE Management characteristics to deal effectively with the hopes, fears, and aspirations of three key groups: your customer, your management food chain, and your team. I call this Expectations Management, and it is your key to succeeding in the project management jungle.