CENTER FOR BUSINESS PRACTICES®

What Makes a Good Project Manager



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EDITORS

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Introduction

Jeannette Cabanis-Brewin

Nature or Nurture? Education or Experience? Soft Skills or Nuts and Bolts?

The debate about project manager skills and competencies, according to the stack of research materials piled high on my desk, is well into its third decade. The Project Management Institute weighed in last year (2002) with its *Project Manager Competency Development Framework* (also on my desk) — a slim volume that barely hints at the heated worldwide discussion this topic evoked. At meetings where this standard was under discussion, everything was on the table. Not only the old question of soft skills vs. hard skills, but also philosophical and even political issues. Is PM a kind of wisdom that floats above technical knowledge, applicable anywhere, or is it simply a useful adjunct to technical knowledge … or is it the other way 'round? Could gender and ethnicity even play a role?

The good thing about a topic that stirs plenty of debate is that there's plenty of research data generated. In a pinch, one can look at lists compiled by a dozen or so organizations, academics, and consultancies to check out where their views on "the good project manager" converge. When resources as diverse as software companies, professional associations, and academic researchers agree on something, you can probably take it to the bank.

What project manager skills, competencies and characteristics are in this zone of convergence? A modicum of technical

skill seems to be taken for granted: that's what gets a project manager candidate in the door. After that, the role seems to succeed or fail based on what are variously termed "Organization and People Competencies" (Assoc. for Project Management, U.K.), "Personal Competencies" (PMI), or "High Performance Work Practices" (*Academy of Management Journal,* 1995). PMI's list of project manager roles (from *A Framework for Project Management*, PMI, 1999) reads like a soft-skills wish list: Decision-maker, coach, communication channel, encourager, facilitator, behavior model … This last item was explored in research by Dr. Frank Toney of the University of Phoenix. In his book *The Superior Project Manager* (Marcel Dekker, 2002), he states that "honesty" trumps education, experience, and even intelligence as a desirable quality in project managers. The essays, book excerpts, and other materials in this book therefore focus on key personal skills and interpersonal abilities, such as mentoring, decision-making, facilitating, and communication. The skills assessment at the end of the book might be a good place to start in order to focus your reading on your issues of top concern.

HAVING SAID ALL that, the definition of the "good project manager" is a moving target. As economic and cultural factors change, the project manager role alters in response. And the elements of the role have different importance to different people in the organization. To an employer, a "good" project manager is one who brings the project in on time and doesn't waste any money. To a project team member, it might be more important that the daily environment of the project isn't one that careens from crisis to crisis, accompanied by raised voices and slammed doors. A key insight from the past decade in project management/human resource research is that perhaps what's good for the team member … is also good for the bottom line.

What Makes A Good Project Manager

Deborah Bigelow, PMP

Many of us have fallen into the profession of project management. Now that we're here, what does it take to make us one of the best? Obviously, a good project manager (PM) possesses skills, talent, and breadth of experience — but what makes a good PM one of the *best*?

Some say the *best* project managers exhibit extraordinary energy levels, phenomenal political skills and an absolute obsession with results. While I agree these characteristics are probably the most common, they are only the first identifiers … there are more … lots more.

From recent articles and highlights of successful projects, there appear to be some common threads woven into the personalities of successful PMs:

- Love of their work … and embracing the challenges
- Clear vision … and communicating this vision
- Strong team building skills … and setting positive tones
- Structure and alignment … creating the environment and direction

Originally appeared in *PM Network*, Project Management Institute, April 2000.

- Strong interpersonal skills … listening to and leading their teams
- Discipline … completing each phase of the project properly
- Communication skills … knowing when and to whom to communicate.

Frank Toney reports in the newsletter *Project Management Best Practices Report* that a study of The Top 500 Project Management Benchmarking Forum identified traits of a best practice project manager. According to the study, the best PMs:

- Are recognized by stakeholders as the single most important factor in project goal achievement
- Are truthful in all dealings and relationships
- Exhibit eagerness to organize and lead groups
- Exhibit evidence of a strong desire for goal achievement
- Are even-tempered
- Have faith that the future will have a positive outcome
- Have confidence their personal performance will result in a positive outcome.

These champions bring a can-do structure and discipline to organizations, helping them transform informal processes into a project management culture and force. A recent article in *Computerworld* featured a story of a senior vice president of a Fortune 500 organization. This VP's project

management staff initially resisted his program of discipline, structure, tools, training, and leadership. They were accustomed to mediocrity. But as his staff became more effective at their jobs, they realized his way was better. In fact, he and his team of 25 were able to reduce the project cycle time 15% to 25% and cut personnel expenses by 10% per year while taking on bigger and more complex projects.

How did he do this? He encouraged his team to be innovative, to translate business processes into logical processes, to be structured, and to have discipline. He did not allow shortcuts. He knew that taking time on the front end of a project would save time on the back end. (How many of us have been in positions where we allowed our deadlines to dictate how and when to move forward? How many of us, despite the fact that we knew we had not planned or defined the requirements adequately, moved into our next phase? I know I've been guilty and I've paid the price.)

Structure in a project starts from understanding the objectives of the project. A manager of a structural design firm was recently put on a 12-month project, which was floundering. The project team had lost focus. This manager's approach was to create a visual feedback mechanism. He grabbed a conference room, declared it their home, and displayed everything that was relevant on the walls. Having everything in front of this team forced them to look at it. It created clarity and aligned everyone in the same direction. Personal accountability was established, as was consistency and trust. The project was brought in four days ahead of schedule at a quality level above standard.

Can you *learn* to be a better project manager? In PMI's *Project Management Handbook,* Barry Posner and James Kouzes say yes: job experiences in particular, but also relationships, formal education, and training, can all help you

develop the skills and traits necessary to be one of the best. Evaluate your own experiences after each project and learn from those lessons; meet with admired and successful project managers and learn from them. And study lessons learned from histories of previous projects by reading or by participating in classes and workshops based on these best practices.

GOOD … NO, THE *best* project managers assume responsibility for their actions. They realize that they are totally accountable for project (and personal) success or failure. Once they understand what it takes to be the best, they do whatever they can to assure success. How do you measure?

PM Maturity: Professional Development

J. Kent Crawford, PMP

The overall purpose of professional project management development is to develop the level of professionalism that exists within the organization's project manager and project team member resource pool, as well as to develop how the organization supports and views the professional requirements for project management. This is viewed by the following subcomponents:

Individual Project Management Knowledge

Individual knowledge base refers to the knowledge acquired by the individual in project management — a degree, a certificate, an awareness of the need for project management education.

Excerpted from *Project Management Maturity Model,* Marcel Dekker, 2002.
PM Solutions' Project Management Maturity Model provides organizations with a conceptual framework within which specific processes can be optimized to efficiently improve their project management capability. The model has five distinct levels of maturity, each of which represents a discrete organizational capability. This chapter describes the processes and practices at each maturity level of a key component for rapidly developing a sustainable project management culture — professional development.

Individual Project Management Experience/Competence

This refers to the individual's actual experience in working on or leading projects. Examples of project experience include working as a project controller, planner/scheduler, estimator, project management process expert, methodologist, project administrative support (change control, action item, contract compliance, reporting, etc.) or mentor. Competency is measured by determining the effectiveness of an individual's work efforts, or an individual's ability to successfully lead the delivery of projects of varying size and complexity.

Corporate Initiative for Project Management Development

If the corporation acknowledges project management as a cornerstone for building corporate success, then they will incorporate environmental success factors, such as formalized professional developmental programs or project management career path (including training, compensation, motivation, etc.) for their project managers and project team members.

Level 1: Initial Process

There are pockets within the organization that have recognized that the skills and abilities required to successfully lead a project are different than for other job functions, and thus could be considered a separate job function. However, there are no corporate standards or processes in place from which one can build the justification for a professional project management career path. Individual managers may recognize and give credit to specific individuals for their project-related accomplishments, but this is done on an ad hoc and individual basis.

Individual Project Management Knowledge

Some individuals within the organization may be recognized or acknowledged for knowing more than others about some project management aspects, such as an ability to use a scheduling tool, an awareness of a budgeting mechanism, or an ability to develop a general project scope statement.

Individual Project Management Experience/Competence

Some individuals within the organization may be recognized or acknowledged for successfully working on or managing a project. This success is considered unique to the abilities of the individual.

Corporate Initiative for Project Management Development

Some managers within the organization may have acknowledged or recognized the accomplishments of an individual who has worked on or has led a project with a successful outcome.

Level 2: Structured Process and Standards

There is a general recognition within the organization that an individual's knowledge base, experience, and competence are contributing factors to the successful outcome of projects. As such, for large and highly visible projects there is an expectation that the project manager will have a fundamental knowledge set about project management and that the individual project team will be made aware of what is expected of them with regard to project management planning components. The organization now has a track record that documents the value of an individual's knowledge base, experience, and

competence as significant contributing factors to the successful outcome of projects. As such, the organization expects that most individuals working on projects will understand how to apply the fundamentals (triple constraint) of the corporate project management process. In addition, the organization has begun to define different project-related roles.

Individual Project Management Knowledge

It is expected that project managers on large or highly visible projects will follow a defined process for attaining the triple constraint (scope-schedule-cost) and will be able to document and track these elements. It is also expected that individual project team members will understand what is expected of them in fulfilling these elements (such as contribution to scope validation, identification of schedule activities, and estimation of associated hours for completing schedule activities). Most individuals working on projects are expected to understand how to define the triple constraint elements of scope, schedule, and cost, and what is required for tracking them. For large and highly visible projects it is expected that the project managers will be able to develop a complete project plan and manage to that plan. Some individual project team members are beginning to recognize project-related areas of specialization, such as scheduling concepts, budgeting concepts, project management methodologies, etc.

Individual Project Management Experience/Competence

It is expected that project managers on large or highly visible projects have managed other projects in the past successfully through proper control of project outcomes, attaining a

managed triple constraint and positive customer evaluations. It is expected that individual project team members have also had successful experience working on other projects and have demonstrated strong individual and teaming attributes, as well as timely delivery of high-quality deliverables. Most project managers within the organization have been project managers on previous projects and generally have a track record for successfully completing projects within the triple constraint parameters. Some individual project team members are beginning to demonstrate project-related specialties where they have strengths, such as planner/scheduler, estimator, or methodologist.

Corporate Initiative for Project Management Development

The organization acknowledges that it is necessary to have a defined project management process and has made an educational course available to project managers and project team members on large or highly visible projects to educate them on how to utilize this defined process. In addition, there is a recognition process in place whereby those who are successful on large or highly visible projects will be acknowledged and compensated for their performance. The corporation makes available to anyone who will be involved on a project a project management essentials course, and all are encouraged to take this course to ensure a basic understanding of project management concepts and applicability. The organization is also beginning to define specific project-related roles that would be assigned to specific project team members. As such, the corporation recognizes that these separate roles will require different training, compensation, and motivation.

Level 3: Organizational Standards and Institutionalized Process

The organization has a defined project management process in place, and all project managers are expected to follow the process in planning and managing their projects. The organization has established different project-related roles and expects that the individuals who are pursuing a project-related career progression will complete a gap analysis defining their current project management knowledge and experience and their desired state, thus determining what their needs are.

Individual Project Management Knowledge

All project managers are expected to have a solid knowledge base about how to plan and track projects, including following the defined project management methodology of the organization, which addresses all knowledge areas. In addition, project managers are encouraged to pursue a relationship with a professional project management association and work toward a certificate or degree related to project management. Project team members who are interested in the profession of project management are encouraged to define an area of project specialty (or overall project management) and work toward attaining the knowledge required to fulfill that role.

Individual Project Management Experience/Competence

Project managers are evaluated on their project performance, which includes their ability to meet the triple constraint parameters, customer satisfaction, and project team member satisfaction, to define a competency range that can

be utilized for defining effectiveness. Project team members are actively pursuing the organizationally defined project roles and effectiveness measurements that are established to define competency in each of these roles. Client satisfaction surveys are periodically conducted to ascertain the abilities and impact of the project manager. This information is utilized to help determine competency and contributes to performance-related compensation.

Corporate Initiative for Project Management Development

The corporation insists that all project stakeholders (within the organization) attend a project management essentials course that covers the basic elements of project management and the specific roles and responsibilities of various project stakeholders (such as executive management or project sponsor). In addition, there are a series of project management courses geared toward the career progression of a project manager and there is at least one course for each of the recognized project team specialty areas. The organization recognizes that effective project management is a cornerstone to organizational success and that to create an environment for success the organization is responsible for defining project-related professional tracks. As such, the organization has defined different roles (and associated compensation, training, and motivation) within a project that are considered project team roles at or below the status of project manager: project manager, project controller, planner/scheduler, estimator, and project administrative support. Those who are interested in pursuing a career in a project-related discipline should have a gap analysis and game plan to gain the knowledge and skills required.

Level 4: Managed Process

Management supports the integration of the professional project-related tracks into the corporate human resource structure of the organization. Individuals are specifically hired based upon their project management knowledge and competence in the planning and execution of projects.

Individual Project Management Knowledge

Project managers on large or highly visible projects are expected to have a degree or PMP-type certificate. Project managers on small- or medium-size projects are encouraged to pursue a certificate, degree, or foundation set that demonstrates a solid knowledge base in project management. Project team members who have chosen to focus in a project-related specialty area are actively pursuing a related certificate or degree in that area.

Individual Project Management Experience/Competence

A project-related role competency measurement has been defined and individuals are given a continuum that can be utilized for performance measurement and career growth. Client satisfaction surveys are periodically conducted to ascertain the abilities and impact of both the project manager and the project team members. This information is utilized to help determine competency and contributes to performance-related compensation.

Corporate Initiative for Project Management Development

The organization is actively staffing and providing a complete training curriculum for each of the different project-related roles from project manager to project sponsor to

scheduler, etc. Additional project-related positions are defined by the organization for those who have the ability and interest to go beyond the general management of projects (thus are considered positions above that of project manager) to project management process expert, project management methodologist, and project management mentor/advisor. A compensation package for each role is in place and is based upon performance measurements as defined in the role competency. Individuals are motivated based upon the career progression within the project management track, the incentives built into the system for successful project performance, and the customer satisfaction.

Level 5: Optimizing Process

Improvement procedures are in place and utilized. Lessons learned are regularly examined and used to improve documented processes. Projects are given high value within the organization; thus there is high visibility to the individuals who are actively involved in projects on a regular basis. Projects are directly tied to the success of the organization; thus there is a financial tie to success of the organization and the project-related positions that are responsible for successful project performance.

Individual Project Management Knowledge

An improvement process is in place to continuously improve the individual's knowledge base in project management. Lessons learned are captured and used to improve the monitoring and control efforts. All senior project-related personnel are either certified or degreed in their project specialty area and are serving as mentors/advisors to those who are pursuing a project-related career path. All

nonsenior project-related personnel are actively pursuing a chosen project-related career path. Lessons learned about assessing individual project management knowledge are captured.

Individual Project Management Experience/Competence

An improvement process is in place to continuously improve the individual's ability to attain experience and improve competency in project management. Lessons learned are captured and used to improve the monitoring and control efforts. All senior project-related personnel are seasoned professionals with multiple years of experience working successfully in their specialty area. Lessons learned about the application of project management knowledge to practical application are captured.

Corporate Initiative for Project Management Development

An improvement process is in place to continuously improve the organization's ability to enhance the project management professional track and opportunities. Lessons learned are captured and used to improve the monitoring and control efforts. The corporation supports and sponsors project manager- and team member-related certificate programs (such as requiring all project managers to be PMP® certified) and expects that individuals who define project management as their professional area complete the requisite corporate training curriculum. Senior project-related personnel are represented or involved in the executive corporate meetings and in defining the strategic direction of the organization. Lessons learned about the development of project personnel, turnover, and the correlation to successful project outcomes are captured.

What to Look for in a Project Manager

Dr. Jimmie L. West, PMP

In today's business environment, it is not enough for professionals to develop a high level of competency in a specialty; they must also develop the art of managing people. As more and more organizations move to a project-centric business model, technically competent people are increasingly being asked to take on the mantle of leadership. The project mangers who are most successful in this environment will possess not only technical and experiential background in their field, but also a strong sense of leadership capability.

Technical knowledge and skill have long been recognized as necessary for project managers. After all, you can't effectively manage a project if you don't know what needs to be done. Part of this technical proficiency is the ability to develop the necessary planning documents that should be used on every project, such as the work breakdown structure, a risk plan, a change management plan, the schedule, the budget, and a communication plan. These I consider to be technical because they are based on fairly visible information and reflect the customer's need. However, as much research has borne out over the years, a project does not generally fail because of errors in the project plan. It is more

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likely to fail because the human elements are not properly managed.

To decrease the risk of such failures and to capitalize on the capability of their team, project managers must develop the skills of conflict management, decision-making, communication, delegation, and motivation. These are all considered to be "soft skills" because they rely on the interpretation of human behavior. Not only should project managers develop these skills, they should also develop the ability to deploy them in appropriate situations.

Conflict Management

The several styles of conflict management that a project manager can use are generally broken down into *avoiding, accommodating, forcing, compromising, or collaborating*. Each of these approaches can be effective — in the right situation. For example, if the conflict is minor and has little bearing on the outcome of the project activity, it may be appropriate for the project manager to avoid or ignore it altogether. On the other hand, if the conflict seems to be taking longer than usual to resolve, it may be necessary to force a resolution in order to protect the goals of the project. If there is time to explore several options, then a more collaborative approach may be most effective. If the conflict is affecting team performance, it may be necessary to forge a compromise in order for the team members to refocus and move on with the project activities.

Decision-Making

Decision-making styles also vary and include *autocratic, democratic, consensus*, and *laissez faire* approaches. It's easiest

if the type of decision-making approach to be applied is identified and documented in the team charter, a project tool developed by the team with the help of the project manager which helps establish team expectations as to management style during the project.

As with conflict resolution, each decision-making style has its appropriate time and place. An *autocratic* decision is useful when there is little time available for seeking inputs from team members, as in a crisis situation. A word of caution: the frequent use of this style can be detrimental to team performance. To overcome the negative repercussions of autocratic decision-making, the project manager should provide the team with an explanation of why an autocratic decision was needed.

If there is time to seek input from team members, then the *democratic* approach is usually helpful. This is an exercise in delegation by the project manager. The role of the project manager in this approach is to provide some guidelines and timelines for the team to consider as they attempt to reach a decision. The biggest advantage of this approach is the buy-in of the team members.

A variation of the democratic method is the *consensus* approach. This is different from the democratic approach in that complete agreement is not necessary. What the team is seeking is acknowledgement that all team members either agree with the decision or that they at least feel that they can live with it.

Finally, the *laissez-faire* approach (from the French expression that roughly translates as "let it be"). Typically, situations in which this approach is effective are characterized by a lack of urgency. These are situations which will come to their own conclusion without the intervention of the project manager.

Communication

Project managers need to be able to do two things: understand their own preferred communication needs and style as well as the communication needs and styles of their teams. In the terminology of the Myers Briggs Type Inventory (MBTI), the way people gather and process data can be described as either "sensing" or "perceiving." This means that people prefer to communicate by using either the data collected by the five senses or by using their perceptions of that same data. Because of this difference in preferences, a potential exists for misunderstanding between team members. A skilled project manager is aware of these communications issues and can use this awareness to prevent conflicts caused by misunderstanding based on preferences.

Motivation

Motivation is a function of understanding what people need and want in the way of leadership. The MBTI identifies four types of motivational preferences: *traditionalists, adventurers, humanists*, and *visionaries*. The challenge for a project manager is to match his or her motivational style with the motivational preferences of team members.

Traditionalists thrive when there is structure and order on the project team. This need is met fairly simply by having documented procedures and a clear hierarchical organizational structure.

Adventurers thrive when there is a sense of excitement and danger present on the project. The astute project manager can accommodate this need by assigning the more challenging and risky work of the project to these types of people.

Humanists are concerned with the welfare of the members of the group and the need for growth. The project manager can capitalize on this need for unity by assigning tasks that require team effort versus individual efforts.

Visionaries thrive on creating the big picture for the team. To accommodate this need, the project manager can assign tasks that involve the development of strategies or idea generation to determine the best possible solution.

SUCCESSFUL PROJECT MANAGERS will not only demonstrate the capability to develop technically sound project plans, but also demonstrate the leadership skills in the areas of conflict management, decision making, and motivation. Familiarity with the MBTI approach to understanding differences is a big plus for any project manager.

Competencies of IT Project Managers

Robert P. Wourms

Much has been written about competencies of project managers. Some focus on the "art" vs. the "science" of project management; others differentiate between "leaders" and "managers." Both conclude that successful project managers need a mixture of the two. The leader/art side requires strong communication, visioning, and interpersonal skills, while the manager/science side requires detailed knowledge of methodology and tools, plus strong analysis and problem-solving skills.

Like the general project manager, those that manage large IT projects also require a mixture of these two disciplines plus an understanding of the technology being developed. In many ways, the competencies of the successful IT project manager correlate with the three organizational competencies of a successful IT Project Office: (1) people skills, (2) methodology and process knowledge, and (3) technology understanding.

People Skills — Talking the Talk

Without question, the most important competency of the project manager is the ability to communicate with others: in

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one-on-one sessions, in small groups, and before larger audiences. The project manager must be able to articulate the final vision of the product and sell its benefits to all constituents, including the end user. Often this involves one-on-one persuasive skills to convince the executive sponsor, the IT boss, the CFO, the project team members, the vendors, etc., to take specific action or support some new process to reach the future vision. Without these persuasive skills, people would not be assured of the end result, would question the direction set by the project manager, and would spend a considerable amount of time discussing the issues internally before making their own decision.

People Skills — Communication+

In addition to strong communication skills, the project manager needs interpersonal skills of listening, empathy, showing recognition and praise. Issues crop up continuously throughout a project life cycle, which can change the product scope, the schedule and price, and/or the risk of successfully completing the project. The project manager must be actively listening to anyone willing to verbalize concerns. This will not only develop respect from the team, but will also provide early warning indicators of problems ahead. While listening and communicating with others the project manager should show empathy for what that individual or group is going through. It is important to understand the total environment and be able to restate that concern back to individuals so they know that you understand and care about their concerns — even if nothing can be done to satisfy their requests.

People Skills — Motivation

One of the more significant techniques of the project manager is that of motivating the staff. This is most effectively

accomplished by giving recognition and praise to those achieving their objectives. People want to feel important and will usually put in the time to accomplish a task, knowing that they are being recognized in front of their peers.

Methodology and Process Knowledge

In addition to people skills, the successful project manager must also understand and follow standard project management methodology and organizational processes. Knowledge of the Project Management Body Of Knowledge (PMBOK®), Software Development Life Cycle (SDLC) methodology, and of organizational policies will make the project flow much smoother and quicker. It is also the responsibility of the project manager to ensure that all project team members understand and follow the standard processes. If every project manager had his or her own method, then team members would squander time and effort as they learned yet another project manager's method. Likewise, the project manager could not depend on status reports from subordinates who had not yet mastered the technique. Without standard processes, the project manager could not identify the critical path, and would be at a severe disadvantage in allocating resources for upcoming phases of the project.

The Organization's Role

Adhering to the standard methodology is as much of an organizational competency as it is an individual project manager competency. No matter how "process savvy" an individual project manager is, if everyone is using a different process, only the long-term project teams will show signs of success. This is because they (over a period of time) have probably developed some best-practice processes for their team. Once everyone in an organization has been trained

and follows the standard process, then success can be gained across the organization. At this time, it is very critical for the individual project manager to understand, follow, and coach the team to follow the process.

Technology Understanding

Understanding the technology being utilized on a project, whether hardware or software, will provide the IT project manager with an advantage over those that don't have a clue. There are many purists within the project management world who will say that a good project manager can manage anything. However, there are many examples of IT project managers who lost control of a project because their technical leads provided erroneous estimates or faulty reasons for falling behind schedule or purchased unneeded software; and this was allowed to take place simply because the overall project manager did not have sufficient technical background to know the difference.

This does not imply the project manager should be an expert in technology, but that he or she should have sufficient knowledge to understand and question requests coming from the technical staff and to have a good feel for whether the estimates are reasonable. This technical understanding, along with solid communication skills, allows the IT project manager to explain technical issues to the non-technical members of the community, while gaining additional respect from the technical members.

BY DEVELOPING COMPETENCIES in all three dimensions, the IT project manager will gain the trust of the project team, will be more likely to deliver quality products on time and within budget, and will effectively promote the end product to the user community as well as to executive management.

The Competent IT Project Manager

Jeannette Cabanis-Brewin

Management thinking has a way of coming full circle. Years ago it was taken for granted that a "heroic" project manager was the secret ingredient for bringing projects in on spec. After a 20-some-year flirtation with tools and processes — mainframe tools, decentralized tools, web-based tools … more methodology, less methodology — all of which have failed to give us a dramatic leap in the success rate of IT projects, the focus has once again fallen on the "people side."

Gartner, Inc. reports that insufficient skills of the project manager are responsible for 60% of IT project failures. And, says the respected IT research firm, projects that fail cost companies $75 billion per year on average.

In *Taking Control of IT Costs*, (Financial Times/Prentice Hall, 2000) Sebastian Nokes goes into depth explaining how and why IT project failures can be so damaging. He points out that IT plays a pervasive role in customer relationships — much more so than managers often realize. "Changing a billing date by two days to save $10m or so, for instance, may not seem like a difficult decision to every manager, but if all your customers rely on billing being done when it always has been, then it's a big issue," he explains. In the

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same way, IT can influence and shape internal relationships within the organization, smoothing or fragmenting communications and workflow among team members, departments and business units. There's nothing like a failed software implementation to create disgruntlement from the executive suite to the lowliest end-user. Everyone wonders: Does this company know what it's doing, or not?

Finally, Nokes adds that IT and particularly MIS [management information systems] "can determine what management knows and doesn't know." Without correct or comprehensible information, good decisions cannot be made. And the difference, he says, between the companies that have learned to properly manage IT-related intensive projects and business rests with the individual project managers. Small wonder that the word "competency" seems to be everywhere you turn.

The Perfect Project Manager?

In 2001, *Computerworld* interviewed several CIO's searching for a profile of "The Perfect Project Manager" (Mary Brandel, Aug. 6, 2001). While the individuals interviewed differed in some specifics, the consensus seemed to be that there are three essential areas of competency in IT: Technology, business, and behavior … not necessarily in that order. In fact, George Nassef, CIO at Hotjobs.com, stressed the importance of behavioral traits: "In order to motivate IT workers, you need … an understanding of human behavior and how to motivate teams." The dawning awareness of the importance of personal traits in the success of IT project management is also evident on the excellent website of the Treasury Board of Canada, whose "Enhanced Framework for the Management of Information Technology Projects"

details the core competencies required by a person managing an IT project in the Canadian federal government. The document breaks down IT PM skills into three areas: General management skills, project management skills, and IT management skills. One wonders if the order in which these knowledge and skill areas are listed is intentional. If so, then the stress placed on people skills is considerable. Under the general management heading, the knowledge areas listed include thinking skills, organizational awareness, leadership, interpersonal relations and communication, while the objectives of the knowledge area are concisely laid out: "judgment, integrity, self-confidence, flexibility, initiative, [and] perseverance … to act with consideration of issues, ethically, confidently, in a style appropriate to the environment, beyond the basic necessities and consistently with the plan of action."

By contrast, the descriptions of project management skills, such as managing project scope, time, cost, quality — a list taken directly from PMI's nine knowledge areas — and the IT management skills (lifecycle phasing, estimating, constructing software, etc.) seem simple. (Read more about this Enhanced Framework at www.cio-dpi.gc.ca/emf-cag/corecompetencies/cc-cb01_e.asp.)

This heavy emphasis on what seem to be character traits more than professional competencies is underscored by research. In the December 2000 issue of the *Project Management Best Practices Report*, we reported on the research findings of Dr. Frank Toney, organizer of the Top 500 Project Management Benchmarking Forum. His work stressed the fact that a competent project manager is the key to project success. But he pinpointed a surprising competency as No. 1 for PMs: Honesty, he said, was the make-or-break factor. (His findings have since been published in the book *The Superior Project Manager*, Marcel Dekker, 2001.)

Assessing Competency

It's one thing to make a list of desirable competencies for an IT PM, and quite another to determine who has those competencies internalized and available for use. Organizations like CompTia offer IT project manager certifications which cover the technical basics, but are short on measurement of behavioral and business competencies. Degrees such as the MBA may or may not communicate a mastery of business skills, and recent research has indicated that MBA managers are often short on people skills. The debate over exactly what is promised by the Project Management Professional certification — knowledge? or competency? — continues to rage. Meanwhile, training firms are stepping into the breach, offering companies structured frameworks for assessing employees and candidates. One such program is the project manager competency assessment from PM College, a set of Web-based tools for measuring competencies and performance. The program has three main components: a multi-level knowledge test, a personality and cognitive assessment, and a multi-rater survey reviewing the current performance of project managers. The program combines a Knowledge Assessment Profile based upon the nine areas identified in the *PMBOK® Guide,* with the Caliper Profile, which measures the candidate's project management *potential.* (Visit www.pmcollege.com/competency for additional program details.)

The "potential" piece of judging a project management candidate is a stab at uncovering a person's propensity for the qualities noted by Toney and the Canadian Treasury Board. Whether or not these scores prove to be predictive of performance, only time will tell. Meanwhile, the PM College program is forging a path towards providing answers to beleaguered IT managers in search of successful projects.

Born for the Project Life?

Another line of inquiry surrounding PM competency is whether or not the essential qualities of the PM can be taught, or whether they are inborn talents. In a recent *Computerworld* story, editor Kathleen Melymuka asserts that "You can train somebody to be a good project manager, but great project managers seem to be born, not made. Excellence depends on certain innate characteristics: Some of us got 'em, and some of us don't." She quotes HR experts in the IT field as recommending that IT project managers have competence in technology, business and behavior … but if you can only fulfill one of these three requirements, go with the behavioral competencies. The words "intuition" and "chemistry" are mentioned, as well as the "vision thing."

IT MAY NOT be that difficult to ascertain if a candidate has the requisite knowledge of project management concepts — that's specifically the information conveyed by those initials "PMP" after someone's name — but how can companies hope to measure qualities like judgment, integrity, and ethical conduct? Only the observation of a project manager at work in the context of project teams, customers, and organizations, over time and through the daily difficulties of projects, can make these qualities visible.

"Seven Habits" for the Project Manager

Dr. Jimmie L. West, PMP

One common element of all of the leadership training and development opportunities I have participated in as student or teacher over the years has been the importance of relationship management. Every project, whether it has a co-located team, distributed team, or even the rapidly emerging virtual team, requires a project manager to develop and hone their skills of human interaction — the skills needed to work effectively with their team members, stakeholders, and other interested parties. One approach widely used has been Dr. Steven Covey's habits of highly effective people. When you read Dr. Covey's work, it becomes clear that those seven habits can easily be translated into a project manager's guide for relationship management. The seven habits espoused by Covey are: be proactive, begin with the end in mind, think win/win, first things first, seek first to understand then to be understood, synergize, and sharpen the saw. Translate these into the project management context and you have a common sense approach to managing relationships on projects.

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Being Proactive

The very meaning of this word implies that a person does not wait for things to happen, but goes out seeking to make things happen. For a project manager, this habit can take the form of asking for information, seeking feedback, or initiating interactions with stakeholders. Proactive also means that the project manager is always looking at the future based on current performance and attempting to spot problems before they manifest themselves. In the vernacular of project management, this is called risk management. This one habit, if practiced effectively, will lead to a more knowledgeable management style and reduce the need for crisis management.

Beginning with the End in Mind

Project managers should easily recognize this precept as understanding project scope. The idea here is that successful projects begin with a clear definition of scope in order to generate more accurate project plans. A project manager using this habit is really engaging other habits as well, but the most important one is that of communication. Getting a clear understanding of the project scope requires that the project manager engage the customer in a variety of ways in order to determine which requirements will best meet the customers needs. This habit in the project world also serves as a means of tracking the project. When a project manager develops the project baseline plan, in effect they are beginning with the end in mind. During the project, all of the tracking data should help the project manager determine whether or not they will meet their objective.

Thinking Win/Win

This of course refers to the area of negotiation in the project management world. In most contract negotiations courses I have taken or observed, very little emphasis is given to thinking that both parties can achieve their goals in a negotiation. The prevailing mentality is that one side will win and one will lose. To practice this habit, the project manager must put aside this particular belief and focus on building and maintaining relationships. Certainly, this habit doesn't work unless the other party believes in win/win as well, but it is up to the project manager to demonstrate this in order to get the other party to begin thinking this way. This is true in contractual relationships with customers as well as vendors.

Putting First Things First

Project managers will recognize this as setting priorities. Project managers are involved in a great number of activities; to be effective, they must prioritize so that the important things are done first. There are many tools to help the project manager do this — the WBS, the schedule with the critical path identified, risk management, and change management. Getting in the "habit" of prioritizing also means that project managers combine the first habit with identifying the important things. Being proactive means that they can always check with the customer to be sure that the right things are being done, that any new things added to the list are important to the customer. This one habit has the potential to improve management efficiency for a project manager. We can get rid of those nagging feelings of "too much to do in so little time" if we focus on the important things first.

Seeking First to Understand, Then to be Understood

This particular habit — my favorite of the seven — is a critical component of thinking in a win/win mind set. It basically means that the project manager needs to practice the art of listening to the speaker without trying to interrupt or find the right phrase to reply with. Trying to understand the customer by listening and hearing what they say can also improve the probability of determining the scope of the project correctly. Understanding the other side's position in a negotiating session will generally provide additional insights and plant the notion that you are very interested in what they have to say. Dr. Covey goes so far as to say that this habit can generate more goodwill in a relationship than any of the others.

Synergizing

This art plays an important part in being proactive and thinking in a win/win way. Synergizing really provides the project manager with the opportunity to get the best solutions to problems by incorporating the best parts of several options. In negotiation, this comes about by seeking first to understand. For team members, it is a clear message from the project manager that their input is not only valuable, it is necessary in order to achieve the best alternatives to problems. When project managers use this habit, they increase the opportunity for team members to take a greater amount of ownership in their part of the project.

Sharpening the Saw

This is imperative if the project manager wants to improve performance capability. In the project management world, this really means renewing your knowledge base whenever the opportunity permits. Opportunities would include conferences, seminars, chapter meetings, or other avenues. The interchange of ideas allows project managers to keep up to date with the latest and greatest ideas in our field.

Simply speaking, the seven habits, taken in the context of project management, are the very skills and behaviors we've always known provide the foundation of a solid and effective management style for project managers.

Decisions, Decisions, Decisions

SEVEN STEPS TO SUCCESS

Karen R.J. White, PMP, and Kerstin Klebbe

Of course anyone can make a decision — we have all made our fair share, and then some. On a daily basis we are confronted with decisions to be made. An actual decision is not difficult to make, but making a decision with confidence and making one without regret often prove to be difficult. The challenge we face is to make a decision absent of bias — after all, we must remember, no decision can be categorized as either right or wrong. Often we make the best decision possible with the information we have to work with, only to have change and uncertainty impact the outcome.

Let's take a closer look at decision-making … a kind of art, if you will, one that most often seems to be simple. To become better decision-makers in both our personal and professional lives, we must understand that decision-making is a process. The various methods or tools that may assist in decision-making are merely adjuncts to this process. Knowing both the process and some useful methods of decision-making will make us more efficient and confident in our daily choices.

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Steps in the Decision-Making Process

Define the decision.

One of the most significant actions to be taken in any given situation is analysis. Depending on the time frame for the decision you are responsible for making, you will have to analyze or define the circumstance. Determine what the actual decision is: What needs to be decided? When is the decision needed? What are the consequences of not making that timely decision? Could your decision raise an ethical or moral dilemma?

Plan ahead; create a timetable.

There are decisions that need to be made at the spur of the moment and others that may be determined at the end of a week, month, six months, or longer. In any case, you must set deadlines for yourself. Effective time management helps in lowering the level of stress often involved with decision-making and it will allow you to make the best decision. Even in the case of the "I need a decision now," insist on giving yourself time to think the decision through. Even five minutes of contemplation can help you make a better decision.

Identify and utilize available resources.

Take advantage of all resources that are available to you. And take all the time you have to do the necessary fact-finding. Research, research, research. To make the most educated, meaningful, and of course, the best possible decision, you must possess the information that surrounds the topic of your decision. Having information, data and/or

Decision-Making Steps

1. Define the decision and the circumstances of the decision.
2. Plan ahead and outline a time frame for your decision.
3. Seek out and use all available resources.
4. Determine who is impacted by the final decision; encourage their involvement.
5. Weigh all the options, think through alternatives and consider consequences.
6. Make the final decision and be prepared to support your decision.
7. Follow through and stand by your decision with confidence.

case studies on your decision topic will help you feel confident in your choices. One of the most obvious and most accessible resources is the Internet. Seek out sites that are reliable and don't base your decision on just one source of information. Check out your local library, ask friends or family, or locate organizations that may specialize in the topic or your decision. General reference books and materials will also prove to be invaluable to your decision-making responsibilities. Solicit the lessons-learned of others who might have been in the position of making a similar decision in the past.

Determine who will be affected by the decision.

Don't forget to consult with others who are directly or even indirectly affected by your decision. Perhaps you were given the responsibility of making the decision, but, especially in the workplace, others should be surveyed on the topic and

informed as progress occurs relative to the final decision. Actively solicit their inputs, asking them to evaluate the pros and cons of the decision, and discuss the risks associated with the options you face.

Weigh all options.

Brainstorm ideas on paper. Having a written record of your thought process or opinions of those involved in the decision-making will not only help in making the decision at hand, but could also come in handy for future decision-making responsibilities. List pros and cons of alternative decisions. Think about the consequences of your decision. Evaluate the risks associated with the options. A decision-making tree can be particularly useful in documenting the options, assigning probabilities and risks to each, as you develop your decision.

Make the decision.

When it comes to crunch time and the decision needs to be finalized, be prepared. You may not be able to simply provide a decision; your decision may require an explanation of sorts or at least require support. Have reliable and truthful information ready to present should your decision be questioned. Providing a list of resources you consulted may help in selling your decision to others involved; this is especially important for your future position in decision-making responsibilities. Making a decision is a great opportunity for showing your confidence and skills in researching to reach a decision that is the best fit for the given circumstances.

Follow through.

Even after the decision is finalized and accepted, you are not necessarily relieved of your ownership and responsibility to the decision. Follow through on the decision's implementation, and be prepared to reverse the decision or modify it, if you discover it was not the best decision after all. Revisit your assumptions and the information you used to make the decision, determining where something was overlooked.

WHILE THIS METHOD isn't very specific, if you remember the general steps to decision-making, it helps to make life a little easier and make you a little more confident in your choices. It's comforting to know when you or your team has made the optimal decision at the time and in that situation.

Your thought processes and time management skills will be key in your decision-making success, so be prepared and have those resources readily available for decision-making responsibilities that require immediate attention. Keeping yourself as prepared as possible in advance allows your attention to focus on the specifics pertaining to the decision at hand.

More information is better, so be sure you have access to the Internet, colleagues, friends and/or family members and those general reference or books relating to typical decisions of your profession within arm's reach. Don't forget to consider ethics and other moral issues in your decision-making process. Finally, you must trust that your personal and professional experience will help you to make the best decisions.

The Entrepreneur Meets the Project Manager

C.J. Walker, PMP

Project managers are increasingly expected to be more than "implementation specialists." Today they are expected to have the aptitude to apply consulting and entrepreneurial skills by identifying opportunities, leading requirements definition, and managing stakeholder expectations. They are also expected to have refined people management and communications skills, to be keen problem solvers, and to be capable of sophisticated risk management. Davidson Frame, author of *The New Project Management* (Jossey-Bass, 1994), defines these new responsibilities as the "New Project Management," in which the consulting aspect of project management evolves into more of an entrepreneurial role.

However, although the roles of project manager and entrepreneur share some skill sets, a key distinction lies in the way these two entities interact with "the team." Unlike entrepreneurs, who are not known for their team management skills, project managers need to have "team perseverance," and be able to function effectively within the corporate bounds as both excellent team players and motivators. The project manager cultivates and develops a team,

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whereas an entrepreneur sees a team only as a means to a specific end and may not perceive any need for long-term development of personnel.

Project Manager, Entrepreneur: What's the Diff?

A few of the attributes of an entrepreneur are identified above, but let's consider a more comprehensive collection of attributes, as defined by John Kao in his book *The Entrepreneur* (Prentice-Hall, 1991), to determine how his 11 common characteristics relate to the project manager:

- Total commitment, determination, and perseverance
- Drive to achieve and grow
- Opportunity and goal orientation
- Taking initiative and personal responsibility
- Persistent problem solving
- Realism and a sense of humor
- Seeking and using feedback
- Internal locus of control
- Calculated risk taking and risk seeking
- Low need for status and power
- Integrity and reliability.

These characteristics are desirable for any colleague, regardless of whether or not the colleague is a project manager. The question is, how might these traits be applied within a project management setting, as compared to an

entrepreneurial setting? One critical distinction lies in the difference between project management and entrepreneurship. Project management is a methodology, a series of processes that carry an idea from initiation to implementation. Entrepreneurship is the way in which an individual interacts with his or her world; a willingness to take risks, initiate something new, go it alone, and take full responsibility for the outcome — including design of the work — without being tied to rules, processes, or even methods. Comparing these roles reveals a paradox:

If it's in the nature of an entrepreneur not to be tied to rules, processes and methods, how can project management as a methodology be of value to an entrepreneur? Conversely, how does a project manager, whose success is measured by the ability to follow rules and attain the triple constraint, adopt an entrepreneurial state of mind?

The Nature of an Entrepreneur

Entrepreneurs are often described as dreamers and idealists who possess a high degree of optimism, which carries them through even though, 85% of the time, their ideas fall short of their vision. Their perseverance and hard-driving nature are driven by a self-imposed necessity to succeed, and their commitment to their objective is paramount because they will not spend time on anything to which they are not 100% committed. Entrepreneurs prefer to rely almost exclusively upon their own initiative, and their greatest satisfaction is gained from independence and autonomy, over any measure of security that might be offered through a corporate structure — these are eagles; they don't flock together, unlike geese that have an instinct for flying in prescribed patterns. Where entrepreneurs cross over into the realm of project

management is in the execution of their ideas. Entrepreneurs need to be more than tenacious idea generators. They also need to have a keen sense of how to implement their ideas and be outstanding negotiators and politicians. That's why, during project implementation the entrepreneur can benefit from the knowledge and skill of the project manager.

The Nature of the Project Manager

Traditionally, project managers have been expected to be control and tool experts, mastering the areas of scheduling, budgeting, allocation of resources — essentially adhering to the triple constraint. However, because project managers generally have an executive advocate known as the project sponsor, they are not alone in bringing the project to fruition. They are also not expected to create new opportunities, ideas, or generate new projects, but rather are considered the arms and legs of the project sponsor, who is responsible for this function. The lack of power and responsibility afforded the project manager, in juxtaposition with complete accountability, has been one of the greatest obstacles for project managers in their implementation role.

Project managers are often described as pragmatic implementers who readily adhere to a process and framework and who have the tenacity to reduce uncertainty and increase the likelihood of a successful project outcome. The project manager functions within a prescribed methodology, and strives to control all outcomes by keeping precise records and maintaining control of every detail of the process in order to reach the outcomes, which are defined by someone else. Project managers are committed to the project outcome, and therefore the focus of their job, their role, and the goal they set out to achieve, adheres to someone else's

expectations. However, project managers cross over into the realm of the entrepreneur when they are expected to function in an up-front role in project definition, managing client expectations during project execution, and defining additional opportunities when their project concludes. While project execution requires the traditional PM skills, in project initiation and closeout a more entrepreneurial stance can be of benefit.

The drive, tenacity, "can do" spirit, and opportunistic nature of the entrepreneur can be of value to the project manager, but it must be adapted to fit into the realm of project management. This is revealed by the way in which the entrepreneur considers the "sense of self" as compared to how the project manager considers it. Entrepreneurs tend to be exceedingly competitive and self-oriented/focused; but if project managers become overly competitive and self-oriented they will not attain the requisite buy-in and support from the organization (including the project sponsor) that is required for project success. Their sense of self makes entrepreneurs believe they can make anything a reality; however, project managers recognize that without their team and sponsor their efforts are dead in the water. This sense of self also is prominent in how failure is regarded by these two entities. Entrepreneurs see failure as a learning tool, and thus expect to encounter failure (actually more frequently than success; they play the odds). Project managers, on the other hand, are not in a trial-and-error environment, but rather have been given an opportunity to implement something to which the corporation has committed time and resources and which corporate leaders are confident should succeed. Therefore, project managers are held accountable for the attainment of others' goals. Their failure to manage to the triple constraint is considered negatively within the

organization, as an indication of an individual's poor project management skills and abilities.

Managing the Paradox

To manage the paradox between entrepreneurship and project management, it is necessary to recognize the value of the attributes of both for corporate success. Corporations must define and recognize what they specifically want to promote when they encourage their project managers to behave more like entrepreneurs because, in its purest form, entrepreneurship doesn't make for good project managers. However, the nature of most corporations is to swing like a pendulum — if things are not going according to plan, then it must be time to change, and that change is generally the opposite, rather than a modified version of their current state. Because we perceive any change as progression, it seems logical that a more dramatic change equates to more progress. This, however, is detrimental to the overall goals of a corporation, which seeks to increase market share, develop economic viability, and create a sustainable environment. A better model than the pendulum would be to focus on balance.

Balancing Act

Thanks to the application of strategic (or enterprise) project management and project portfolio management, the two skill sets of entrepreneur and project manager are beginning to find common ground. Both of these expanded versions of project management, by definition, recognize the successful implementation of projects as one of the key strategic and tactical requirements for successful business operations. A good model for defining this balance between culture and infrastructure can be seen in the eight basic principles defined

by Peters and Waterman in their book *In Search of Excellence* (Warner Communications, 1982):

- A bias for action — a preference for doing something, rather than sending a question through cycles of analysis
- Staying close to the customer
- Autonomy and entrepreneurship — breaking the corporation into small units and encouraging people to think independently and competitively
- Productivity through people — an awareness of best efforts
- Hands-on, value-driven — insisting executives keep in touch with the firm's essential business
- Stick to the knitting — doing what the company does best
- Simple form, lean staff — few people in administration or at the upper levels
- Simultaneous loose/tight properties — fostering a climate where there is dedication to the central values of the company, combined with tolerance for all employees who accept those values.

IN THIS MODEL, the entrepreneurial company also manages projects well. In reflecting on how to balance the paradoxical roles of project manager and entrepreneur, it helps to remember that "the more things change the more they stay the same." As the pendulum swings, it always comes back to center — you will always eventually find that balance, and over the long term, seemingly opposite ends of the spectrum can settle down into a core of useful shared expertise.

Project Manager = Stakeholder Relationship Manager

Dr. Jimmie L. West, PMP

By now everyone knows that projects don't succeed or fail on the quality, breadth and depth of a project plan. Most people realize that projects succeed or fail on the human interaction, team-building and relationship maintenance skills of the project manager. Recently this belief — along with the systems that support it — has been given the name "customer relationship management." The limiting characteristic of this definition is that the idea of relationship management is confined to customers. In reality, relationship management extends beyond the customer to include all stakeholders, especially team members and peers.

As I perceive relationship management, it is a process that starts with the project manager and becomes incorporated into a team's psyche. The project manager creates an atmosphere that brings attention to the importance of identifying all of the potential stakeholders, and subsequently determining which of these stakeholders are essential to the success of the project. I prefer to use J. Davidson Frame's definition of a

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stakeholder. In his book, *Managing Projects in Organizations* (Jossey-Bass, 1995) Dr. Frame defines a stakeholder as anyone who has the ability to affect the project with a single vote. He conveniently refers to this as a unit veto.

There are any number of categories that identify stakeholders: customer representative, user, senior managers, peers, functional managers, and others. The number of stakeholders can be enormous and overwhelm the project manager. A project manager must conduct an effective analysis that will sort the stakeholders into manageable populations that will allow him/her to better manage this element of a project environment. Here's one approach to stakeholder analysis.

Analyzing Stakeholders by Attitude

A simple approach to this categorization is to use groups such as *allies, neutrals,* and *opponents.* The *ally* group consists of those stakeholders who are supportive of the project and its outcomes. This group will benefit from the successful completion of the project and therefore can be relied upon to support the project manager in times of need.

Opponents, on the other hand, represent a group that has no interest in the successful project. In fact, they may be a threat to the project to the extent that they go out of their way to hinder or completely interrupt it. Their goals tend to be ones that are achieved when the project does not meet expectations.

The *neutrals* (or fence-sitters as I call them) represent the group that does not have any benefit or detriment tied to the project outcome. These are the people who, while not doing anything to hurt or injure the project, also do not openly support or help it.

Tailoring Communication to Fit

The best project tool that focuses on relationship management is the communication plan. According to the *PMBOK® Guide,* the communication plan forces the project manager to identify the various communication needs of the stakeholders and design a system that will effectively deliver the appropriate information to the correct stakeholder. When I conduct training around project communication planning, I encourage students to think of the project manager as the communication director of a larger entity. The communication plan encourages the project manager, along with the key members of the project team, to identify the various types of information required by the various stakeholders to keep them informed. Along with this information, the project manager and the project team need to determine the frequency of the information, the format, and the content. Once they identify these elements, they can design a plan that will deliver the right information to the right stakeholder. The communication plan forms what I like to think of as a filtering system. Each stakeholder requires a specific subset of project information. Few, if any, require all of the information, so the job of the project manager is to design the communication system to foster the collection and dissemination of information efficiently and effectively throughout the life of the project.

Maintaining Functional Relationships

A common stakeholder on most projects is the functional manager. Functional managers are stakeholders because, typically, they own the resources that are assigned to projects. Project managers should ask themselves what type of information the functional manager needs in order to stay supportive of the project. Most functional managers need to

know who you need on the project, when they will be needed, what level of skill is required, and how long their resources will be tied up on the project. This information can be generated easily using the project schedule to develop a resource utilization matrix. Any software tool will provide this information and the project manager just needs to identify and format appropriate reports. During the project implementation, this same functional manager can be kept updated on a regular basis by accessing the schedule, reviewing selected work packages, and providing a status report on that functional managers resources. Doing this proactively puts the project manager in a good position to keep the functional manager in the category of ally. When the time comes that the project manager needs extra resources to meet a critical deadline, it is more likely that the functional manager will be responsive to the request.

This same approach can be used to possibly convert an opponent to an ally or, at the very least, a neutral party. When the project manager takes the time to determine what the real issues are for the non-supportive stakeholder that can go a long way to identifying what it would take to move them to an ally position. The project manager should use the same approach to managing their expectations as they would for an ally. Find out what is important to that opponent then determine a way to address that in the communication plan. This will demonstrate to that stakeholder that they are important and that their needs will be considered important to the project team.

RELATIONSHIP MANAGEMENT IS not a panacea for all problems. When it is done professionally, it will go a long way to helping the project succeed. When it is done badly, the stakeholders will see it as manipulative and withhold their support from the project.

The (Un)Spoken Word

Jeannette Cabanis-Brewin

"Don't say things," early American writer and philosopher Ralph Waldo Emerson warned. "What you are stands over you the while, and thunders so that I cannot hear what you say to the contrary."

Emerson was onto something: Clinical studies done over the past 30 years have shown that up to 93% of our communication is accomplished on a non-verbal level. This helps to explain why our e-mail messages are often misread or misunderstood; they are lacking the context of important cues, built into human communication over the centuries, such as tone of voice, facial expression, and gestures.

Nonverbal Elements of Communication

Listening

In our rush to make our point, we often forget that communication is a two-way street. The feedback loop is often ignored as we deliver our elevator pitches, fire off e-mails, and craft proposals and presentations. Yet the fact is, if your target audience misunderstood you, no "communication" has occurred. How do you find out if you are understood? You *listen*.

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Much of communications skills training focuses on talking — yet good communication, because it begins with identifying your audience, is founded on listening. An effective listener listens not only to the words but to the meaning of the words, endeavoring to understand what the speaker is *feeling*.

Listening helps to show your support and acceptance. It enables each team member in a meeting, for example, to speak and be heard and to ask questions to clarify, check assumptions, or clear up misperceptions. Through listening, you surface the key points or issues. Develop the "attending skills" that demonstrate you are listening: Don't interrupt; pay attention; paraphrase facts and feelings. Use verbal cues that let the person know you are listening, such as "I see," "I understand," "Go on," "That's a good point," or "I can see that you feel strongly about that."

Gestures and Body Language

If you think the importance of physical context in communication is limited, just think how a wink and a nod change the meaning of any statement. Of course most of our physical cues are not so obvious, and some are even unconsciously broadcast. Crossing your arms over your chest may mean — and signal — defensiveness or unwillingness to open up to the information being presented. Slouching in a chair during a meeting may telegraph "boredom" to the others present. When communicating face-to-face, pay attention to what you may be "saying" unintentionally. Is your posture confident? Is your demeanor friendly and welcoming? When practicing listening, it's especially important to use body language that invites trust. Squarely face

the other person, giving him or her your full attention; adopt an open posture (no crossed arms!); lean in slightly toward the other person and maintain eye contact. Try to be aware of cultural issues that affect how gestures are interpreted.

Silence

The pace of our society often precludes this precious resource for communication. Whenever a silence falls, someone jumps in to fill it. Yet any good psychotherapist will tell you that silence is worth its weight in gold when something other than a snap decision or automatic response is needed. Giving people time to think and formulate detailed responses results in better, clearer information exchange. To this end, experts advise, ask open-ended questions in interviews and meetings. Preface questions by "Let's take a moment to think about this before we respond."

WHEN PLANNING ANY communication, remember the words of St. Francis of Assisi: "Seek first, not to be understood, but to understand." Paying close attention to both words and context when communicating face-to-face with others will pay off in improved relationships. And relationships are, as Tom Peters has said," the new currency of business."

Facilitation Tips for the Project Manager

Ford T. Alison, PMP

We all seem to fall into the same trap after taking some new soft skills training. We think our new skills are "the greatest" and can't wait to apply them. In the case of facilitation skills, this can be a mistake.

Although facilitation is a great tool for the project manager, knowing how to use it and when is critical. A facilitator leads the meeting, enforces rules of the meeting and helps the group to arrive at decisions or directions. Because the project manager has influential input to the discussion, limits where a discussion may go (in advance with the facilitator), and has significant input into the final decision, he or she may not always be the correct person to facilitate. In fact, if you try to facilitate all your own meetings, I can pretty much guarantee disaster.

Project Manager's Tipsheet

Here are some suggestions that may help you better utilize your facilitation skills in conjunction with excellent project management skills — in some cases, as you will see, this means appointing someone else to do the actual facilitating.

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Never facilitate your own project meeting.

A facilitator is an outside party brought in to use certain skills to direct meetings and efficiently reach an acceptable solution. A facilitator does not have a vested interest in what the solution looks like. A project manager is very involved in contributing to a solution and must implement it. The project manager needs to be free to contribute at any time, whereas a facilitator does not contribute. Some people go so far as to say, "I will wear two hats today, so I'll need to let you know what role I am playing during the day." But no one is truly capable of being that objective: if you are the project manager, you'll always be the interested project manager.

To resolve this dilemma, many companies encourage experienced facilitators to make themselves available to other project managers. Working with each other as a team adds strength to the organization and improves project performance. So ask others to facilitate your meetings, and offer to do the same for them.

Prepare in advance to facilitate a meeting.

In the project management world one of the key meetings that can be facilitated is the initial project planning session. These typically last one day, with a smaller group reconvening a few days to a week after. There may be 20–40 participants, so just keeping on track is a full time job. Plan on spending a day or two in advance preparation. Meet with the project manager, understand the role of the individual participants and obtain some background on the key individuals. Make sure that you talk with members of senior management who will be in attendance. Icebreakers are critical in these meetings, but some senior staff may have problems with them being suddenly introduced. Make sure

you know what is acceptable. Prepare all the wall sheets in advance and have some extras just in case.

This advice to a facilitator also applies to the project manager. You need to focus on advance preparation. Make sure the facilitator understands the meeting objectives and goals. That means not only stating them but also having the facilitator state them back to you. The facilitator needs as much background as possible. Review the key participants and their possible hidden agendas. Some may say this is stacking the deck but to me it's just good common sense. If there are areas that are not open for discussion, lay out these parameters in advance with the facilitator.

Allow time for a post-meeting recap.

If you spend a day preparing and a day in the meeting you will need at least a day to recap. Preparing a final version of the notes, issues and action items is the first step. Then you will need to review this with the project manager (allow lots of time as they often have a different recollection of what happened).

Don't be afraid to ask for help with recording.

In small meetings, you can probably fill all roles, but for larger groups, try to find another experienced facilitator that will work as a recorder. You may even want a three-person team if possible.

Use components of your facilitation skills in regular meetings.

Many project managers are doing this without having any formal facilitation training. During the weekly project team meeting, sidebar conversations occur on important project

issues that are outside the meeting scope. Rather than solving the sidebar issue you agree to record it as an action item. You've just used one of the key components in a facilitated meeting: the action items list. Maybe you aren't as formal about it, but you are using facilitation tools. Of course if you start using action items, it is essential to follow through with assignment and resolution after the meeting. Just remember that your role in the meeting is as project manager — not a facilitator.

Don't panic when it looks like you are losing control.

It happens to the best of us. Either a sidebar discussion gets out of hand before you can park it, or a group with personal agendas tries to take control. You may have to let people vent for a few minutes on an issue to clear the air. Then you should be able to park it on one of the lists and get back to the main agenda. Trying to stop a runaway sidebar before it's been aired can cause more damage than allowing it to finish. This is something you need to learn from experience. Observe how others facilitate meetings when possible. You can also enlist key players such as the project manager and sponsor to help you keep sidebars under control. But arrange it in advance. Don't ask them for help during the meeting. They should be primed to jump in if needed.

Don't ask for a facilitated meeting if you need to control the final result.

Facilitated meetings are great for planning and for resolving tough issues but the project manager gives up some control of the final outcome. Make sure that you can live with any decision that may come from the facilitated session. You can

limit your exposure by making sure that the facilitator understands your goals for the meeting. That way the meeting can be steered somewhat in the desired direction.

Decision-making meetings should not usually be facilitated.

Generally speaking, senior management need brief, factual presentations with a limited number of options. You may have a facilitated team meeting to resolve a key issue and then take the results to the decision-makers. First off, they often don't need to know all the background and they certainly don't need to see what may be perceived as dissention on the team.

On one consulting engagement, I made the mistake of letting both of these situations happen. My client often used facilitated meetings to make decisions. As a result, a scheduled three-hour session lasted five hours! The room was wired for laptops and I noticed that the decision makers were checking e-mail and so on during most of the meeting. (Fortunately they came to the right decision!) I should have held the three-hour meeting with the team only, and then had a 30–45 minute session with key team members and senior management to review the results.

Remember that one goal of a meeting is usually team building.

Meetings held early in the project's life usually involve team building. Especially if members from the business and technical areas are joining together on the project, this means more up-front planning with the facilitator. If there are any group breakout sessions, make sure that the groups are planned

out in advance. Also, using icebreakers that introduce individuals to one another are very important. Again, you may do group icebreakers and make sure you control how people are split. This can be done by controlling seating or by providing individuals with cards indicating their group.

Learn to use icebreakers appropriately.

Many people think they are silly or a pain. The fact is they work if properly employed. Observe how and when others use them. It takes time for them to be natural, but they are a key component of the team building that can occur during meetings.

ONE LAST PIECE of advice: Facilitation skills are just another tool in your arsenal. Use them in conjunction with other meeting management skills. They are not the ultimate solution.

Collaboration Rules

Jeannette Cabanis-Brewin

Collaborate: "To labor together," according to the dictionary. But in today's complex world of work, collaboration has become much more than that. It's hard to do Internet research on collaboration; not because information is lacking, but because it's everywhere, and pertains to everything. Type in that word, or any variant of it, and you will come up with everything from MIT's Dept. of Coordination Science, to online Linux labs, to programs for schoolteachers, to Web-enabled community/business partnerships. Collaboration seems to be the word of the hour.

In fact, the engine of change in business and in society is driven by four nested layers of collaboration:

1. Personal skills for working with others
2. Team skills for effectively achieving group goals
3. Collaboration among business units or groups of stakeholders within an organization
4. The high-dollar version — collaborative commerce: the ability of companies who might once have been in competition to work together, on projects, via software, and across the Web.

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Because org change is evolutionary, and tends to be most effective when it grows from the grassroots, it's hard to imagine creating a culture of partnership on the corporate scale when individuals are still hoarding information and treating team members like foreign Olympic rivals. Indeed, a recent article in *InformationWeek* (The trust imperative, 30 July 2001) by John Soat noted that collaborative commerce ventures, despite their enormous potential for profit and cost-cutting, have not caught on as fast as they might because of the huge culture shift that such ventures require.

To paraphrase the song, "Let there be collaboration in business, and let it begin with me."

Personal Skills for Collaboration

It would be nice if the skills of collaboration were those easy skills … you know, the ones we used to call "hard skills"—the ones involving software and hardware and charts and math. But in fact, you could make the case that collaboration is the business-world corollary to marriage. Writer Alan Watts once called relationships "the yoga of our times": the discipline that forces us to stretch and breathe and work out all the kinks in our behavior. Working collaboratively does just that. We can be both at our best and our worst when working closely with others. Group work both creates synergy and tests our patience; charges the creative juices, and forces us to fine-tune our communication skills. So at the most basic level of collaboration, we find the toughest personal challenges. But since that is what the whole edifice of collaboration throughout corporations or industries is built on, that foundation better be solid. Some building blocks:

- **Personal mastery:** The elements of self-management that are covered in Daniel Goleman's books about Emotional Intelligence are central to effective collaboration. Mastering anger; learning to empathize with others and pick up cues about how they are feeling and what they are thinking; and understanding when it is appropriate to put one's own agenda aside and open up to the ideas of others … these personal skills are the foundation of harmonious teamwork.
- **Communication skills:** Yeah, yeah, yeah, you already heard this a thousand times this year. But we'll say it again: The ability to put your thoughts into words, clearly, accurately and sensitively, in person and in writing, is basic to working with others. Among the most important communication skills: active listening. Practice paying close attention when others are talking to you: note the cues they give you through tone and body language. Rephrase what you just heard them say. "So, what I'm getting is that you think our chances of succeeding with this plan are being compromised by the schedule estimates?" Check in to make sure you understand their meaning. Sometimes you might be surprised. "No, that's not what I meant!" is a common response to the active listener's thoughtful query.
- **Character:** What quality did Ford Motor Company determine was most needed to improve their business productivity? Compassion. What did Nokia list among the top ten factors contributing to their success? Humility. Lester Thurow (professor of management and economics at MIT) wrote in the 3 October 2000 edition of the *Boston Globe*, "Humbleness means

that no matter how good you are, you recognize that you have a long way to go before you're really good and that you recognize that no matter how good you are, a lot of your success is traceable to good luck. Arrogance — 'We make no mistakes' and 'We're on top because we are good' — is the opposite of humbleness and always leads to disaster." And in his research on the characteristics of the superior project manager, Dr. Frank Toney of the Executive Initiative Institute found that honesty was more valuable than technical know-how. Honest project managers, he noted, could get more buy-in and loyalty from a team, because they are trusted.

Team Skills

Some of the factors that most affect our ability to collaborate in groups are personal, and some are organizational. Let's examine the organizational issues first.

The Reward System

It's hard for teams to function as a unit when they are being rewarded as individuals, but that is still the case in many, if not most, companies today. This entrenched organizational behavior is counterproductive in many ways. To begin with, individual performance objectives are arbitrary in a project context, since they cannot account for the interdependence of the team's tasks. As we generally use them, individual performance goals are simply subgoals based on the functional process measures of more senior managers. The most radical — yet most obvious — change is to base all performance appraisals and review systems on the team, and

make the team accountable for team results. For true teamwork to occur, people need common purposes, measurable goals and a common fate. Thus moving toward a project-oriented organization means creating a team-oriented appraisal and reward system. Because the team is in the best position to control the task, the team should be the primary focus of any performance measurement. Functional expertise is a prerequisite to team participation, but appraising performance based on the team's results encourages people to wear two hats.

By measuring performance in the context of the whole process, we overcome the functional silo mindset, which encourages people to focus on their function to the exclusion of the project customer. In the project-oriented company, all employees take responsibility for interpreting the voice of the customer and acting on it to feed new ideas back into the system.

Individual contributors to projects will ultimately benefit from the institution of a team-based reward system, but there will also be changes and dislocations for them to adjust to as they give up certain tasks and take on responsibility and authority to meet customer needs, while gaining the required expertise.

Glenn M. Parker of human resource consulting and research giant Watson Wyatt recommends reward structures that foster collaboration, in which individuals are acknowledged, but primarily for being strong team players — those who "help the crowd stand out, rather than standing out from the crowd."

On the personal level, information hoarding — a relic of the days when competition for scare information resources meant that whoever held the info had the power — is one of the most serious barriers to success in a collaborative workgroup. Failing

to freely give out information — even when it's not required or asked for — hobbles the creative process and slows down the speed of the work. In the knowledge-based organization, the free flow of information is like oxygen: no fire can ignite without it. Many studies are now finding that the biggest barrier to effective knowledge management in organizations is simply a culture that rewards knowledge-hoarding. To counteract this, communicate freely: post, copy, and publish what you know, when you know it. The need-to-know culture is dead … and so will your project be if it operates on that basis, unless you work for the Department of Defense.

Boundary Breakers

When the need arises to communicate across disciplines, departments, and business units, and among teams, project managers ought to be at their best. After all, this is the niche that project management was created to fill. Unfortunately, boundary-spanning skills aren't often taught to new PMs. Instead they have to be learned by painful trial and error. Here, from the Learning Mastery website (www.learnmaster.com) are some examples:

- **Engagement skills:** Not only dialogue, listening, and mediating conflict, but also managing agreements and commitments.
- **Collaborative learning:** Social (learning through doing and discussing in groups), reflective (taking time to process the underlying meanings of learnings) and experiential (just-in-time and on-the-job learning, usually in a team context), collaborative learning ensures that knowledge is shared and lays the foundation for new knowledge creation.

- **Systems thinking:** Knowing how to apply a concept or insight to many layers of an organization, from the individual to the extended enterprise — and beyond.
- **Cultural insight:** Seeing, understanding, and acting upon cultural differences that might otherwise impede communication. To this list, I would add a mastery, on the team level, of the newest tools for collaborative learning, communication, and work. Tomorrow's collaborative ventures will be largely virtual; no technophobes need apply.

IF WE LAY a collaborative groundwork in our personal behavior, team dynamics, and across internal barriers, when the company or project is ready for the collaborative commerce leap, its No. 1 hurdle will already be behind us.

Mentoring: A Core Competency for Project Managers

Jeannette Cabanis-Brewin

Mentoring isn't a new concept. In *The Odyssey,* written nearly 3,000 years go, Homer gave the name "Mentor" to the old tutor who counseled Odysseus' son during his father's long absence. Like this wise old gent, today's mentors "grow" their protégés — also sometimes known as mentees — teaching by word and by example the skills and behaviors needed for success.

Of course, Homer didn't invent mentoring. From prehistory, young people learned how to be adults primarily through mentoring. Only in the last century has school-based training replaced this paradigm with the classroom model. And now, at least in the workplace, the trend seems to be shifting the other way.

A look at the facts about training and development quickly reveals why that is the case. Numerous studies have revealed that just-in-time, on-the-job training is far more effective than the classroom model for teaching workers new skills and behaviors. In addition, studies by the Institute of Research on Learning in Palo Alto, founded in 1987 and

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associated with Xerox's Palo Alto Research Center, have shown that learning is a social activity: that people retain more information, more reliably, when they learn by doing within a group of their peers, rather than through self-study or merely listening and taking notes in a classroom.

For project managers, mentoring — whether we called it that or not — has always played an important role in professional development. As members of "the accidental profession," project managers more often than not learned how to manage projects by managing projects. Until recently, few options even existed for formal training and education. And mentoring still remains "the most effective way to bring new project managers up to speed quickly" according to the *Mentoring Guide* (PM Solutions, 1999).

In his book *The Superior Project Manager* (Marcel Dekker, 2001), Frank Toney, Ph.D., of the Executive Initiative Institute, identifies mentoring as both a skill that project managers should master for success, and as one of the few reliable routes to competence in the project-based workplace. Lynn Crawford, of the University of Technology at Sydney (Australia), a leading project management thinker who was instrumental in developing Australia's government-mandated competency measurement system for project managers, recommends mentoring and other social learning modes (such as communities of practice), as important learning tools for project management.

Who Should Be Mentored?

According to the *Mentoring Guide*, good candidates include:

- First-time project and program managers
- Newer project managers who have had basic project management training

- Technical staff making the transition to management
- Project managers working with a new project management process
- Project managers moving into a program manager role.

The mentee's role is simple: to be open to learning and growing professionally. The role of the mentor includes facilitating that growth by providing information, guidance and constructive comments and evaluating mentees plans and decisions. The mentor supports and encourages and, when necessary, highlights shortfalls in agreed upon performance. Also important to the mentoring relationship — often referred to as a partnership — is confidentiality.

Becoming a Mentor

On the other hand, mentoring someone is an awesome responsibility. Mentors must be willing to give freely of their time. In addition, they must have the necessary skills and appropriate knowledge to be perceived as valuable to a mentee, and they must be able to share what they know effectively with the mentee. That's why good communication skills are critical, according to Patricia Buhler (A new role for managers: the move from directing to coaching, *Supervision*, October 1998).

Key Success Factors

Although it's natural when seeking a mentor or meeting a mentee for the first time to look for "chemistry," Lois J. Zachary, author of *The Mentor's Guide*, (Jossey-Bass, 2000),

says chemistry is overrated. Instead of giving up if the chemistry does not feel right at the first meeting, Zachary recommends that both parties ask themselves, "Can I work productively with this individual? Do I honestly feel that I can further this person's learning?" Mentee and mentor pairs should be encouraged to draw up a mentoring agreement to help clarify their respective roles and expectations. The agreement, while not binding, determines the framework of the relationship.

HR Magazine (Kathryn Tyler, Mentoring programs link employees and experienced execs, April 1998) offers seven rules for establishing an effective mentoring program: clear program goals; voluntary participation; limited duration; strong upper-management support; specific objectives for each partnership; regularly scheduled meetings between mentors and mentees; and an evaluation system to rescue partnerships that may be in trouble. In addition, although mentoring relationships thrive on commitment, it's wise to acknowledge that not all partnerships work out. Thus, most mentoring experts recommend that the program have a specific process and criteria set up to allow for no-fault dissolution of the partnership.

WITH THE PACE of today's projects, knowledge transfer among project managers and team members is more important than ever.

The High Performance Project Team

Eric Foss, PMP

Do you want to succeed? If you are a project manager, your only route to success is to create an environment in which the project team can succeed. To accomplish this, the project manager must approach team development with empathy. He or she must attempt to understand the learning styles, types, and preferences of each team member. This doesn't mean the project manager must become an expert in the writings of Carl Jung. It does, however, suggest that the dynamics that make a great project team aren't necessarily documented in the project plan.

Dr. Howard Gardner's theory of Multiple Intelligences (*Frames of Mind,* Basic Books, 1983), is the ground-breaking work that introduced the idea that people learn in different ways. He named seven kinds of intelligence: linguistic, logical, kinesthetic, visual, musical, interpersonal, or intrapersonal. Tackling Gardner's work would be one way to account for the different types of learning that may be present on a project team. However, developing a broader, more pragmatic view of human learning and interaction is a terrific first step for a project manager trying to create the optimal team environment. Lynn Curry's onion metaphor

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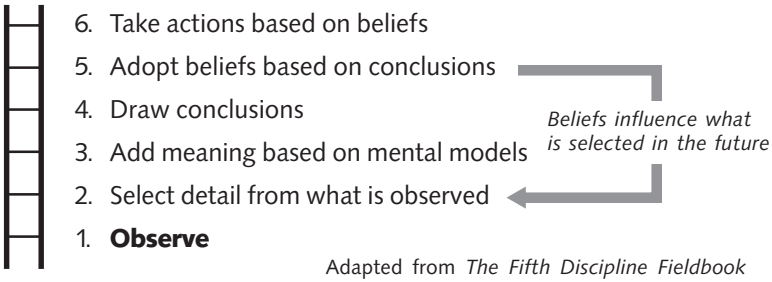
provides a helpful framework for looking at human learning styles.

In the "onion model," each layer of the onion represents deeper human traits — from environmental preferences on the outside layer to personality preferences at the core. By establishing an awareness of the innermost layers, the project manager can begin to better understand the project team members and begin building an environment to optimize their contribution to the project.

Why Does Fred Act like That?

At the innermost layer of Curry's onion are personality traits. Personality traits can be determined using an assessment tool such as the Myers-Briggs Type Indicator (MBTI) or Keirsey Character and Temperament Sorter (http://www.advisorteam.com/temperament_sorter/register.asp?partid=1). A key point to remember when using any assessment tool is that a person's personality preferences are being measured. If the new project engineer has an MBTI profile of INTJ, she should not be labeled as an "unfeeling" person just because she has Thinking ("T") instead of Feeling ("F") in her profile. Her preference, especially in times of stress, is to make decisions by focusing on fairness and equity first, then harmony and the individual second. As the pressures build during the final press for a major milestone, awareness of these preferences can help project team members better understand the actions of their colleagues and build off of each other's preferences in the heat of the moment. They also help the individual gain a better understanding of themselves and how they react daily and how they can provide more value to the team.

The Ladder of Inference



Adapted from *The Fifth Discipline Fieldbook*

Fred's Reactions Don't Make Sense!

The project manager must understand that members of the project team process information differently based on learned or inherent traits. Peter Senge's *Fifth Discipline Fieldbook* brought the concept of "mental models" to the corporate office in 1994. Project managers must be aware that information is being received and filtered, that these filters can lead to a variety of interpretations, and that these interpretations lead to actions. This path can be diagrammed in a sequence of steps called the "Ladder of Inference." Once we start climbing the ladder, our internal processing begins. We all climb the ladder and it often takes only few seconds. Being aware of this tendency is an important first step.

Ladder of Inference

To communicate clearly in the project environment, we must first focus on what is observed. We "observe" at the bottom of the ladder. This is the only step that is free of abstractions. Once there is agreement on the observed, the path up the ladder can then be explored.

Been There!

Anyone who has ever facilitated a meeting with engineers and business analysts can begin to identify the different information processing and personality preferences. Now add a writer, an editor, and a graphic artist to the mix and you have inadvertently created a learning laboratory that could be the envy of many social psychologists. In this operational laboratory, the project manager must recognize, respect, and learn how to optimize the individual preferences to develop a high-performance team.

What Does This Really Mean?

Project team members will be more comfortable contributing when their preferences, both in personality and information processing, are not in conflict with the environment. The design and facilitation of team sessions can go a long way toward creating this environment. The session design together with expectations of participation can help address the individual preferences of the project team members. For example, not all team members might be comfortable providing "on the fly" analysis and feedback. The preference of some individuals might be to process the information by taking it away, analyzing it independently and carefully crafting their thoughts. On the opposite side, certain team members may prefer a heated debate — reviewing, discussing, deciding, and then moving on. If the project manager does not recognize and address this disparity and build a bridge for each individual to contribute fully, the project's success could be affected.

Interesting, But How Can It Be Applied?

You can begin applying these concepts today. Give yourself a reasonable trial period — perhaps 30 days.

Address your personality traits.

Consider using one of the many tools available to determine your personality preference. Observe your actions and how your preferences surface in those actions — especially in times of stress. Enhance your awareness of how you process information. Try to understand your mental models —the thinking and reasoning you use to filter your experiences. Senge refers to this as reflection. Become aware of your ladder of inference. Trace your thinking and try to understand your path from the observed, up the ladder to your actions. Try to separate the facts from your interpretations.

Assess your experience.

Assess your experiences at the end of the self-assessment period. How can any of your learnings provide value to your project team? Determine an appropriate bridge to tie your experiences and new awareness to the project team environment. Once personal introspection is complete, consider involving the project team using a similar approach.

Address personality traits.

Assess your project team's personality preferences. It is best to use a trained facilitator to lead this conversation. When the assessment is administered, a debriefing should provide you and your project team with a solid understanding of the

results. Invite the project team members to observe their actions and how their identified preferences surface in those actions — especially in times of stress.

Enhance awareness of information processing.

Try to understand the team's mental models. Introduce the concepts and give the team time for self-reflection. This will give them an opportunity to recognize their own filters and their personal trips up the ladder. Future team discussion can focus on individual "ladders" and how facts are interpreted and acted upon.

Assess the team's experience.

Discuss as a group how any learnings can provide value to the project team. As you did with your own experiences, determine an appropriate bridge to tie the team member's experiences and new awareness to the project team environment.

The Strategic Project Office Director

J. Kent Crawford, PMP

How the Project Office is staffed is determined by the role your organization expects it to play. If your organization is prepared to deploy a Strategic Project Office — to make the PO the central driving force behind the management of projects — you will want to consider establishing a director of project management who sits at the director or vice president level with other senior executives in the organization. This position, which we will call the SPO Director, provides project oversight in virtually all areas of the organization, managing corporate level projects and overseeing corporate-wide resource distribution and allocation on all projects. Any project that crosses divisional boundaries, as well as some large projects performed within a department, would be under the auspices of this SPO Director.

But the SPO Director is more than simply a glorified project manager. He or she must ensure that the project management process runs well while also seeking to continuously improve it. As the expert on project management, the SPO Director also serves as an ad hoc consultant and advisor to project leaders and teams. In *Reengineering the Corporation* (HarperCollins, 1993), Michael Hammer wrote

Excerpted from *The Strategic Project Office*, Marcel Dekker, 2002.

of the "two flavors" of manager: one a process manager who oversees a process end to end, with skills of performance management and work redesign, and one an employee coach who supports and nurtures employees. A good SPO Director must be both: both the overseer and "owner" of project management methodology and a leading mentor to up-and-coming project talent within the organization. The SPO Director must possess enough stature and respect throughout the organization to champion projects from start to finish — and to recommend canceling projects whose objectives either can't be met or are no longer valid. He or she must have the demonstrable backing of senior management. Like a program manager, the SPO Director is responsible for the on time delivery of projects that fall within the domain of the total program and is responsible for moving resources between and among projects as well as prioritizing projects within the program. While individually accountable for his/her own program (overall direction of the SPO in our case), they may also be measured and held accountable for the success of all projects within their domain. Thus the structure supports the natural desire to work closely with other program managers (or in the case of the SPO Director, with other division or departmental heads).

Here are some of the many hats that may be worn by a SPO Director, depending upon the size and scope of the SPO:

- Relationship manager—working to smooth the interfaces with the business units, develop project requirements through consensus with customers
- Communicating the mission, vision, scope and benefits of the SPO
- Interfacing with all aspects of the business to increase a level of awareness of the services provided by the SPO and the benefits of using those services

- Serving as a liaison to executive and functional management to ensure availability of the appropriate services and participate with them in setting direction for the SPO
- Developing the skills of the SPO staff and project managers throughout the organization
- Prioritizing the application of Project Office resources
- Providing corporate project oversight, checkpoints, and controls
- Reviewing and analyzing the process of project management throughout the organization
- Managing the project office budgets.

As "owner" of the project office methodologies, the Director may also be in charge of the following areas, either by taking personal responsibility for these items, or by employing a methodology expert to fulfill the functions:

- Authoring, maintaining and adapting the project management methods and processes
- Evaluating and selecting project management tools
- Contributing to definition of training requirements on corporate project management training, project management methods and processes
- Developing knowledge management standards and processes for archiving and disseminating project documents, lessons learned, and other intellectual capital derived from project activities
- Developing tools for measuring the level of usage and effectiveness of project management methods used by the organization

- Soliciting and incorporating feedback from project managers for the continuous improvement of the methods and processes
- Defining and conducting project audits.

He or she may also act as a professional development coordinator — or oversee such a position — in order to ensure that:

- Job descriptions are created, maintained, and refined for the project management career path
- Criteria are defined for interviewing, rating, and hiring for project management skills, as well as for identifying people in the organization who are currently acting as project managers and those who are interested in developing their skills in order to become project managers
- Working with each individual to identify strengths and weaknesses in the project management discipline and assisting them in identifying opportunities for developing the appropriate skills and knowledge
- Working with the internal training organization to identify project management training courses
- Working with management to identify individuals or assignment opportunities in order to develop skills and experience.

In short the SPO Director is an integrator of process, a manager of staff, a coordinator of project resources (including project managers), the coordinator of standards and

methods as well as developer and maintainer of tools expertise, a mentor, training coordinator, and point of interface between projects, programs, and the executive staff.

A tall order — and one that must be filled with the same care that companies take in placing a CIO, a CFO, or a CEO.

The Project Manager(s)

Normally, in a single-project environment, the Project Manager manages the day-to-day tasks necessary to move the project through all its phases, while keeping the Project Sponsor (for an individual project) apprised of progress and pertinent new information. As a member of a complex corporate SPO, a project manager carries the same responsibilities with regard to individual project performance, but is somewhat relieved of the duties involved in keeping executive staff informed, since the SPO Director serves as liaison between projects and the executive. Paradoxically, the simpler the Project Office, the more difficult it will be to find a Project Manager with the requisite skills.

That's because the Project Manager of a Level One PO (the lowest and least complex level of Project Offices) must not only manage the project at hand competently but also perform some of the more sophisticated organizational roles of an SPO Director: communicate with the executive staff, understand strategy and business goals, negotiate for resources, and so on. Project Managers within a Strategic Project Office are insulated to a degree from these tasks by the SPO Director.

Project Manager Skills Assessment Tool

James S. Pennypacker

skill *n* : the ability to use one's knowledge effectively and readily in execution or performance; a learned power of doing something competently
— *Merriam-Webster's Collegiate Dictionary*

What skills are needed to be a professional project manager? How do you rate yourself in the attainment of those skills? What can you do to improve your project manager skills?

This *Project Manager Skills Assessment Tool* is a structured means for you to see how your project manager skills fit your goals (or your employer's goals). It can also help you to create a skills development improvement plan. The skills listed in this assessment are based on substantial research on the skills needed to be a superior project manager (see references, page 99).

Skills are at the heart of career development. Any set of skills you possess can be thought of as being at varying levels of maturity. We use five levels in this assessment:

- **Level 1: Novice —** No demonstrated skill, only awareness that a skill is needed (this assessment tool will make you aware of the skills you need, so you're at least at Level 1).

- **Level 2: Developing —** Able to perform basic functions of a skill. Limited to one environment.
- **Level 3: Experienced —** Demonstrates skill in a consistent manner. Can adapt to some changes in environment. Takes on opportunities to exhibit or use the skill.
- **Level 4: Proficient —** Demonstrates great skill in a highly consistent manner. Exhibits mastery of the skill in a wide variety of situations and circumstances. Often regarded as an authority in the skill area.
- **Level 5: Expert —** Demonstrates great skill with the highest degree and breadth of knowledge. Exhibits mastery of the skill in a wide variety of complex situations and circumstances. Capable of mentoring/ teaching others. Continual learning.

To complete the assessment you need to:

1. Assign a skill level that you (or your employer) believe you need to reach to attain your professional goals (remember, research shows that proficiency in all the skills listed is needed to be a superior project manager)
2. Assess your current skill level (be honest)
3. Determine gap (goal level minus current level) to estimate amount of development needed
4. Assign a priority to your skills indicating how important it is to you to be able to use this skill in your ideal role (A=high, B=moderate, C=low)

After you've completed the skills assessment, create a skills development action plan. Select the skills you want to develop, particularly those with the highest priority and/or largest gap. Identify and then participate in specific activities that will build your skills (teaching yourself, learning on the job, getting some training, etc.). You should also identify a means to receive guidance and feedback about your skill development (a mentor, your supervisor, your HR manager). And be sure to collect evidence to demonstrate your new skills (for your next skills assessment or to support you in your promotion).

Developing skills is a lifelong activity. Assessing your skills with this tool will help you clarify what it takes for you to succeed and better able you to make decisions about your development as a professional project manager.

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Project Manager Skills Scorecard

- Choose skill-level goal you want to attain on a scale of 1–5
  (Level 1 = Novice, Level 2 = Developing, Level 3 = Experienced, Level 4 = Proficient, Level 5 = Expert)
- Assess your current skill level (same scale as above)
- Determine amount of development needed (goal level minus current level)
- Prioritize skills (scale: A=high, B=moderate, C=low)

	Goal Level	Current Level	Gap	Priority
Leadership Skills				
Delegating	_____	_____	_____	_____
Empowering	_____	_____	_____	_____
Building trust	_____	_____	_____	_____
Setting direction	_____	_____	_____	_____
Entrepreneurship	_____	_____	_____	_____
Creating and selling the project vision	_____	_____	_____	_____
Motivating	_____	_____	_____	_____
Influencing	_____	_____	_____	_____
Thinking strategically	_____	_____	_____	_____
Exercising judgment	_____	_____	_____	_____
Communication Skills				
Effective writing	_____	_____	_____	_____
Effective speaking	_____	_____	_____	_____
Recognizing information gaps	_____	_____	_____	_____
Presenting and explaining information	_____	_____	_____	_____
Organizing/documenting information	_____	_____	_____	_____
Interviewing	_____	_____	_____	_____
Facilitating	_____	_____	_____	_____
Active listening	_____	_____	_____	_____
Persuading	_____	_____	_____	_____
Presenting arguments	_____	_____	_____	_____
Teamwork Skills				
Coaching/mentoring	_____	_____	_____	_____
Team development	_____	_____	_____	_____
Team member development	_____	_____	_____	_____
Motivating to achieve team goals	_____	_____	_____	_____
Managing performance	_____	_____	_____	_____
Sharing influence/authority	_____	_____	_____	_____
Group decision-making	_____	_____	_____	_____
Information sharing and collaboration	_____	_____	_____	_____
Developing shared goals	_____	_____	_____	_____
Promoting esprit de corps	_____	_____	_____	_____

	Goal Level	Current Level	Gap	Priority
Analytical Skills				
Using intuition	_____	_____	_____	_____
Problem-solving	_____	_____	_____	_____
Making decisions	_____	_____	_____	_____
Implementing research strategies	_____	_____	_____	_____
Generating alternatives	_____	_____	_____	_____
Identifying critical success factors	_____	_____	_____	_____
Gathering, assessing, and integrating information	_____	_____	_____	_____
Estimating, forecasting, and managing uncertainty	_____	_____	_____	_____
Applying appropriate practices and methodologies	_____	_____	_____	_____
Analyzing and measuring statistically	_____	_____	_____	_____
Administrative and Organizational Skills				
Planning	_____	_____	_____	_____
Coordinating activities	_____	_____	_____	_____
Administering contracts	_____	_____	_____	_____
Managing change	_____	_____	_____	_____
Auditing	_____	_____	_____	_____
Budgeting	_____	_____	_____	_____
Goal-setting	_____	_____	_____	_____
Estimating and negotiating resources	_____	_____	_____	_____
Working with other organizations	_____	_____	_____	_____
Measuring work status, progress, and performance	_____	_____	_____	_____
Managing customer relationships	_____	_____	_____	_____
Facilitation	_____	_____	_____	_____
Meeting skills	_____	_____	_____	_____
Interpersonal Skills				
Negotiating	_____	_____	_____	_____
Managing conflict	_____	_____	_____	_____
Exhibiting empathy	_____	_____	_____	_____
Exercising self-control	_____	_____	_____	_____
Exercising tolerance and compromise	_____	_____	_____	_____
Embracing diversity	_____	_____	_____	_____
Self-assessment	_____	_____	_____	_____
Maintaining an open mind	_____	_____	_____	_____
Political acumen	_____	_____	_____	_____
Stress management	_____	_____	_____	_____

Project Manager Skills Scorecard

	Goal Level	Current Level	Gap	Priority
Project Management Skills				
Scheduling	_____	_____	_____	_____
Managing procurement	_____	_____	_____	_____
Using quality management tools/techniques	_____	_____	_____	_____
Using risk management tools/techniques	_____	_____	_____	_____
Estimating resource requirements	_____	_____	_____	_____
Orchestrating and applying resources	_____	_____	_____	_____
Monitoring and tracking performance	_____	_____	_____	_____
Developing time and cost estimates	_____	_____	_____	_____
Managing stakeholder expectations	_____	_____	_____	_____
Integrating technical, business, human objectives	_____	_____	_____	_____

Skills Development Action Plan

- Select skills to develop from above
- Focus on highest priority/largest gap
- Identify improvement methods
- Build your skill levels and reassess yearly

	IMPROVEMENT METHOD						
	Self-instruction	Formal Education	Training (in-house)	Training (external)	Training (on-the-job)	Mentorship	Other
Highest priority skills							
1. _____	❑	❑	❑	❑	❑	❑	❑
2. _____	❑	❑	❑	❑	❑	❑	❑
3. _____	❑	❑	❑	❑	❑	❑	❑
4. _____	❑	❑	❑	❑	❑	❑	❑
Skills with largest gap							
1. _____	❑	❑	❑	❑	❑	❑	❑
2. _____	❑	❑	❑	❑	❑	❑	❑
3. _____	❑	❑	❑	❑	❑	❑	❑
4. _____	❑	❑	❑	❑	❑	❑	❑

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What Makes a Good Project Manager

Jeannette Cabanis-Brewin, "The Competent IT Project Manager"

■ Gartner, Inc. reports that insufficient skills of the project manager are responsible for 60% of IT project failures. And, says the respected IT research firm, projects that fail cost companies $75 billion per year on average.

Dr. Jimmie L. West, "What to Look for in a Project Manager"

■ Research over the years has shown that a project does not generally fail because of errors in the project plan. It is more likely to fail because the human elements are not properly managed. To decrease the risk of such failures and to capitalize on the capability of their team, project managers must develop the skills of conflict management, decision-making, communication, delegation, and motivation.

Deborah Bigelow, "What Makes a Good Project Manager"

■ The best project managers assume responsibility for their actions. They realize that they are totally accountable for project (and personal) success or failure. Once they understand *what* it takes to be the best, they do whatever they can to assure success.

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