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## Module 1 Introduction

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## Introduction

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### Welcome to Maximizing Project Success Through People

Think about the work you do in your current position. How much of it would you classify as technical skills or expertise, and how much of it is the people side (e.g., building relationships, coaching, developing, and supervising team members, negotiating, resolving conflicts)?

As you continue to grow as a leader and project manager, you will find that more and more of your time is dedicated to the people side of work.

Getting ready to take on this expanded “relating” role is what this workshop is all about.

You won’t learn anything here that you don’t already know. Relating skills are something we learn and tune our whole lives. What you may pick up is a new way of looking at relating skills, as well as how to build and use them to be a more successful project manager and leader.

## Introduction

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### Workshop Logistics

You can write down the details of your workshop here.

Facilitator:	
E-mail:	
Start / End Times:	
Lunch (approximately):	
Breaks:	
Facilities:	

## Introduction

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### Workshop Materials

*Over the course of the next 2 days, we will be using:*

- This **participant guide**. We'll go through the book from front to back.
- A variety of exercises, some on **large worksheets**.
- A **Tinkertoy®** set.
- A **personalized development plan**.



## Introduction

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### How to Get the Most Out of This Workshop

*Our goal is to help you make sure your time has been well spent. We suggest that you:*

- Talk. The rest of us will promise to listen.
- Play the games of the workshop. We won't ask you to dress up like a flower and emote about how your team is your garden — but we will work on how we are with others and how we are with ourselves.
- Comment on what you see, hear, think, and feel. It's a form of reality testing for all of us.
- Write stuff down. Not just what you agree with, but the ideas you might be skeptical about as well. Some people buy now, some buy later.
- Go to the washroom when you need to. We promise not to talk about you when you're gone.

## Introduction

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### Workshop Objectives

*By the end of the workshop, you will be able to:*

1. Enhance your skills as a project manager by using an effective orientation towards people. You will:
  - a. Build important alliances across projects to ensure that there will be others to help you the next time you are dealing with a crisis.
  - b. Recognize how your success is dependent on the emotions of team members and customers, and be able to take steps to manage those feelings.
  - c. Build motivation to achieve goals within your team by demonstrating an active interest in each member of the team.
  - d. Avoid the extremes of either micromanaging or not providing enough direction.
  - e. Learn how to refine your style to match different kinds of communications, from one-on-one with team members and stakeholders, to company networking opportunities.
2. Improve your capacity for successful relationships by leveraging your self-awareness. These skills will allow you to:
  - a. Make more effective decisions on how to execute project goals using an understanding of your assets and liabilities.
  - b. Ensure balanced direction-setting decisions using emotional self-awareness as a tool for understanding complex project situations.
  - c. Harness your self-confidence, optimism, and ambition, even after your budget has been cut!
  - d. Avoid the “stressed-out project manager” syndrome using simple methods for accommodating day-to-day project management pressures.
  - e. Manage the emotions that surround the upheaval of change, both in team members and you.
3. Implement a development plan, including the specific, tailored steps you will need to take to continue your growth in key areas. You will learn how to:
  - a. Set attainable goals for your development.
  - b. Establish a system of accountability that ensures your development process continues into the future.

## Introduction

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### Workshop Contents

1. Day One — How We Are With Others
  - a. Introduction and Interpersonal Orientation Assessment
  - b. Taking Initiative to Build Project Relationships
  - c. Developing Greater Awareness of How Others Feel
  - d. Expressing Interest and Concern for Others
  - e. Pursuing Project Results Appropriately
  - f. Maximizing Individual and Group Interactions
2. Day Two — How We Are With Ourselves
  - a. Leveraging Assets and Liabilities
  - b. Enhancing Emotional Self-Awareness
  - c. Tapping into Internal Motivation
  - d. Dealing with Stress Effectively
  - e. Thriving on Change
  - f. Personalized Development Planning

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*Module 2*

# Project Management and the Four Relationships



## Project Management and the Four Relationships

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### Defining the New Project Management

Project management as a discipline is relatively new, having been formalized only within the last half century. It is a specialized form of management that is driven by process, and has traditionally focused on completing a defined body of work within time and cost limits. What has not always been recognized is the fact that project management is first and foremost about **managing**.

*Project management has both a technical and a general management component. The relative importance of each is related to the breadth and size of the project.*

The foundations of general management have shifted tremendously in the last 50 years. As the definition of general management has changed, so has the environment in which projects are performed. Project managers today must adapt to fluid situations with changing customer and team needs. The importance for project managers to demonstrate strong general management skills has never been greater.

The changing business climate has meant that project managers often need to achieve project success through people that do not report to them. Changes in the definition of general management have paralleled these changes in organizational structures.

## Project Management and the Four Relationships

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### The General Management Side of Project Management

The body of writing on general management as a discipline started to emerge with the Industrial Revolution (in England in the 18<sup>th</sup> century). A fairly recent definition, advanced by the President of the American Management Association in 1980, went like this:

- “Management is getting things done through other people.”

A common current definition, repeated in *Barron's Management* (2000) gives us a feel for how the practice of general management is evolving:

*General management is working with and through other people to accomplish the objectives of both the organization and its members.*

Comparing this definition to earlier ones allows us to see the emergence of some key characteristics about how the practice of general management is evolving:

- The importance of the **human relationship** nature of general management is emphasized (e.g., “working with and through”).
- The objectives of individuals play a big role in an organization's ability to reach its project goals.
- Management is about getting results, not just getting work done.

## Project Management and the Four Relationships

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### The General Management Side of Project Management, *continued*

So, the **quality** of a project manager's relationships is now being emphasized in general definitions of management. This is intuitively obvious to most project managers who concur with the idea that general management is not the command and control function that it was once described to be.

This shift in emphasis has brought great interest to bear on another concept — that of emotional intelligence.

*Jack Mayer and Peter Salovey have defined **emotional intelligence** as:*

*The ability to perceive emotions, to access and generate emotions and emotional knowledge, and to reflectively regulate emotions so as to promote emotional and intellectual growth.*

Though such ideas might be intuitively clear, how do project managers justify what may seem like counterintuitive behavior in the face of our day-to-day priority of doing more with less? There needs to be a way to link project success to our managerial relationships.



## Project Management and the Four Relationships

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### Linking Project Success to Project Management Relationships

*Here's the bottom line:*

*A company's capacity for success is directly correlated to its project managers' skills in leveraging relationships.*

Why is this so? Consider what companies do in order to get and stay successful. They:

- Optimize existing products, processes, and structure constantly.
- Innovate new ways to do things.
- Look for gaps in customer satisfaction that they can fill.

These lofty objectives are almost always achieved through projects. So, what is the project environment for a successful company likely to feel like?

- Busy or hectic.
- Focused on performance.
- Team members feel constant discomfort while striving for project goals.
- Change is constant in projects. They work with change, not against it.

In this kind of environment, maintaining a positive energy around project work and achieving results is a tall order for project managers. Perhaps the best way to judge what it takes for project managers to be successful in their role is to ask the companies directly.

## Project Management and the Four Relationships

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### Linking Project Success to Project Management Relationships, *continued*

Researchers such as David McClelland, Daniel Goleman, Ruth Jacobs, and Wei Chen have asked the question a couple of ways. They have used competency models from hundreds of positions, in hundreds of companies, involving millions of workers to address these questions<sup>1</sup>:

**How important are “emotional” competencies to job performance?** 67% of all competencies deemed essential for effective performance were found to be emotional competencies. This held true for all jobs in all industries. In one example of an IT project manager, 73% of 15 competencies were emotional in nature.

**How much more emotional competence do star performers demonstrate?** Results showed that emotional competencies were twice as prevalent as expertise or intellect in contributing to star performance.

Further, the importance of emotional intelligence increases as you move to the top of a company because impact is farther reaching.

This makes sense when we consider that when we are managing people or projects, we are not actually “doing” the work. Rather, we are the motivators, initiators, facilitators, evaluators, and modulators of project work and change in our organization.

*Project managers bring about change through their relationships with others.*

*Project managers really have only one tool to do their job well: their relationships.*

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<sup>1</sup> Daniel Goleman, *Working with Emotional Intelligence*, Bantam Books, New York, NY, 1998.

## Project Management and the Four Relationships

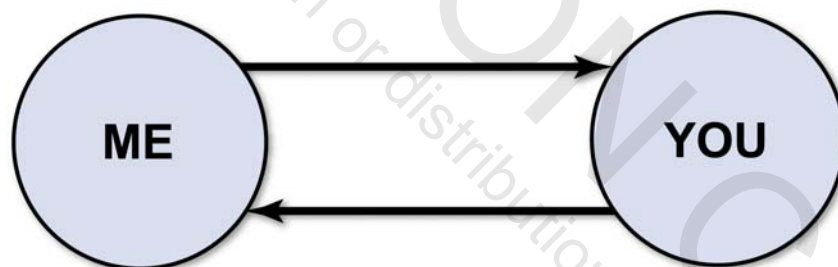
### The Four Big Relationships

Most project managers are well aware of their important project relationships – with sponsors, stakeholders or customers, team members, and vendors. These titles illustrate well the roles people fulfill relating to the project. However, there is a misconception that if someone holds a particular project role, they can be expected to relate to others on the project in a particular way. This just doesn't happen very much for two reasons:

- We're talking about people after all, and relationships with people don't have any reason to follow the rules of project management.
- The organizational structure around projects is often more influential than the projects. Roles and relationships tend to line up with the organization rather than the project.

Our consideration of project relationships needs to be more in tune with the individual project participants and the organization they come from. Luckily, such relationships can be distilled into a fairly simple framework.

*When you think about it, there are 2 sides to every relationship:*



Project management development often focuses on the external part of our relationships (e.g., How to Manage Others, How to Delegate). The underlying goal seems to be in trying to change the behavior of others.

## Project Management and the Four Relationships

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### The Four Big Relationships, *continued*

However, if we look at all of our project relationships, what do they have in common? Every relationship involves US.

*The leverage point for affecting project relationships is really us.*

Until we create the magical tool that allows us to change the behavior of others directly, the only way to influence relationships is by changing the way WE interact with others.

***We do this in two ways:***

- Through our orientation towards people.
- Through our centeredness.

A lot of these ideas are what has been talked about as emotional intelligence. How do successful project managers use relationships to bring success to critical company projects?

- Listening to others.
- Motivating.
- Using good data about what is going on.
- Knowing the business strategy for their projects.
- Getting good people on the team.

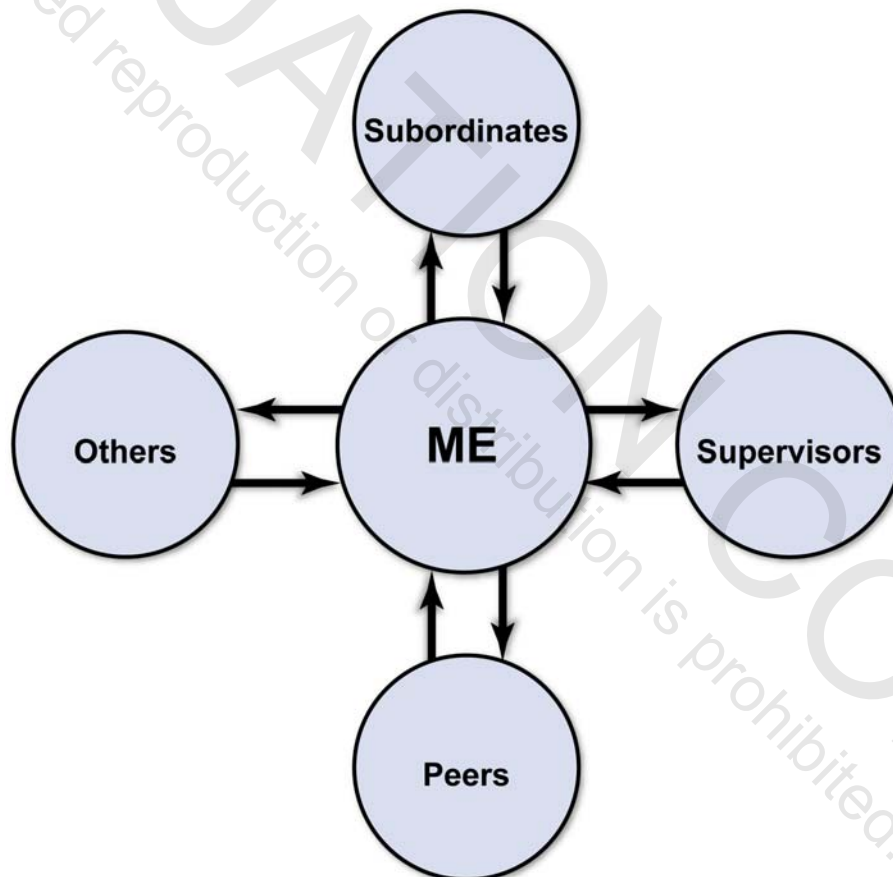
All of these things fit together and interact with each other. We can use a model that builds on emotional intelligence, supported by an understanding of project management relationships and skills in systems thinking.

## Project Management and the Four Relationships

### The Four Big Relationships, *continued*

*There are four principal relationships that project managers draw on. These involve interactions with:*

- Supervisors — those that form a line of authority to the top of the company.
- Subordinates — those that form a line of authority to the bottom of the company.
- Peers — those at the same level within the organization that we interact with.
- Others — vendors, customers, distant peers, etc.



## Project Management and the Four Relationships

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### The Four Big Relationships, *continued*

Understanding how these relationships work is key to using them effectively. This is also a central tenet in negotiating. Let's look at each relationship in turn.

#### ***The relationship with supervisors:***

- Power differential is obvious.
- Interaction tends to be regular (they are more familiar with your behavioral style).
- Degree of our influence on the relationship tends to be less (whether positive or negative).

#### ***The relationship with subordinates:***

- Power differential is obvious.
- Interaction tends to be regular.
- Degree of our influence on the relationship tends to be greater.

#### ***The relationship with peers:***

- Power differential is often not obvious.
- Interactions can be regular or sporadic.
- Degree of our influence will vary, but may not be obvious.

#### ***The relationship with others:***

- Power differential may or may not be obvious.
- Interactions tend to be sporadic; intense at one point, non-existent at others.
- Degree of our influence will vary, but may not be obvious.

## Project Management and the Four Relationships

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### The Four Big Relationships, *continued*

#### *What do all of our relationships have in common?*

- The motives of others are generally not revealed to us.
- The flavor of the individual interactions is situational (.....we are not always fighting, in agreement, understanding well), so we must be using our skills at all times.
- Our perspectives and goals are generally different.

#### *How do we evaluate the structural nature of interactions in our relationships?*

- Evaluation is done in real time (i.e., look at the specific situation, since characteristics change with events).
- Evaluate behavior for clues to their perspective.
- Check your mental models. Are you making assumptions about their motivation? (e.g., “They’re not agreeing because they want me to fail.”)
- Check your desired outcomes. Is it a reasonable goal with this particular relationship? (e.g., “Am I seeking ‘permission’ or ‘perspective’ from my colleague?” “Am I telling my customer what they can have, or what I can provide?”)
- Teams work with a set of situations that stresses the structural nature of a relationship. Teams must find solutions.

*Competence in relating to people is essential for  
our success as a project manager.*

*Module 5*

# Development Planning

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## Development Planning

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### Creating a Personalized Development Plan

#### Introduction to the Personalized Development Plan

Are there particular areas for development in “how I am with others?” What about developmental opportunities in terms of “how I am with myself?”

One of the objectives for this workshop is for you to leave with a personalized development plan that identifies one or two areas for future growth. The areas that you identify can come from “how I am with others,” “how I am with myself,” some combination of the two, or something else entirely that has been on your mind.

#### *A development plan:*

- Is a way to focus on growth as a project manager.
- Is designed to enhance your effectiveness.

#### *Features of a good development plan include:*

- Identifying clear goals, such as, “strengthen my project relationships with my team members by finding ways to interact with them on a weekly basis.”
- Specific timeframes for accomplishing goals such as “make contact with each of my team members at least once each week over the next quarter.” Goals should be scheduled, but not regimented.
- Naming who will “keep me honest” about my progress.

## Development Planning

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### Introduction to the Personalized Development Plan, *continued*

***A development plan is not:***

- A list of all the things you are bad at.
- Designed to beat you up.

***A weak development plan is likely to:***

- Be made up of broad statements, such as, “relate better to my team.”
- Lack a timeframe for accomplishing goals.
- Neglect for accountability during growth.
- Fail to measure change.

Proper follow-up on development planning requires that we measure what changes actually took place. For example, “I was effective in interacting with three of my team members on a weekly basis about 80% of the time.” Or, “I only managed to make contact with my fourth team member about half of the time.”

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*Module 6*

## Summary and Conclusion

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## Summary and Conclusion

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### Where We've Been ...

*Let's review a few of the skills that we have practiced over the last two days:*

- Enhanced our skills as a project manager by using an effective orientation towards people:
  - Built important alliances across projects to ensure that there will be others to help us the next time we are dealing with a crisis.
  - Recognized how our success is dependent on the emotions of team members and customers, and have taken steps to manage those feelings.
  - Built motivation to achieve goals within our team by demonstrating an active interest in each member of the team.
  - Avoided the extremes of either micro-managing or not providing enough direction.
  - Learned how to refine our style to match different kinds of communications, from one-on-one with team members and stakeholders, to company networking opportunities.
- Improved our capacity for successful relationships by leveraging our self-awareness:
  - Made more effective decisions on how to execute project goals using an understanding of our assets and liabilities.
  - Ensured balanced, direction-setting decisions using emotional self-awareness as a tool for understanding complex project situations.
  - Harnessed our self-confidence, ambition, and optimism.
  - Avoided the “stressed-out project manager” syndrome using simple methods for accommodating day-to-day project management pressures.
- Implemented a development plan, including the specific, tailored steps we will need to take to continue our growth in key areas:
  - Set attainable goals for our development.
  - Established a system of accountability that ensures our development process continues into the future.

## Summary and Conclusion

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### Where to Go Next ...

Workshops like this can be energizing. They give us a renewed enthusiasm for doing important work. However, the reality of work life is that your desire to “make some changes” in the way you approach managing projects may not be shared or understood by those around you. Recognizing this can actually make it easier to bring about change in our work.

Your facilitator will give you a blue piece of paper with some instructions for the next 24 hours. Follow these instructions for your best chance of success with your development plan.

Thank you for participating and contributing these past two days.