Project Performance Secrets

Course No: B08-001
Credit: 8 PDH

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Learning Outcomes

Students completing this course will learn:

1. To analyze typical project work processes for opportunities of process improvement
2. Why a different approach to a situation is required for a different outcome.
3. To identify the difference between being productive and busy.
4. To express performance expectations in terms guaranteed to result in productive outcomes.
5. To identify opportunities within existing work flows a potential trip wires to stimulate action
6. To explain the benefit of a “Project Emergency Kit”
7. To list elements for inclusion in that Emergency Kit.
8. To reduce the typical time to productivity of a new project team member.
9. How to lead function leaders within a project in analysis of their work flows for potential problems or delays
10. How to determine whether work flow problems are single events or a dangerous trend.
11. How to determine if the project workload is too much for the existing staff or whether they are underproductive.
12. How to help talent recruiters find the additional help a project may need.
13. How do identify specific behavioral requirements for the job that are not part of the position’s technical skills requirement.
14. How to analyze team member performance issues to isolate the root cause of the problem.
15. How to make sure efforts at solving performance problems to not act as demotivators for project team members.
16. How to determine whether team members are getting appropriate performance feedback.
17. When to train, retrain, or terminate team members whose performance is not meeting requirements?
18. How to define a project’s job description more specifically
19. What kind of term to avoid when interviewing project team applicants.
20. What clues to look for in a team applicant’s resume that should set off warning alarms
21. To develop a strategy to speed a new team member’s assimilation into the project.
22. To create a project Who’s Who database to improve project internal communication and speed new member assimilation.

23. What to look for in the selection of a mentor for a new member on the project
24. How to use the concept of Working Styles to enhance team performance and member interaction

INTENDED AUDIENCE

This course is designed for new, "seasoned' or potential project managers who are willing to consider a fresh way of looking at project execution in a search for improving performance. This course can help them avoid many traditional problems that impact a project's performance while learning tips on decreasing the time-to-productivity time gap of new team members.

BENEFIT TO THE AUDIENCE

The potential benefit to the audience is a way to look more closely at project work flows for potential "barnacles" that can accumulate along the project "ship" and gradually erode its performance. Once these potential dangers are identified and warning 'trip wires" put into place, PMs can create an early warning system to allow them to act proactively to prevent project problems instead of reacting afterward to contain them.

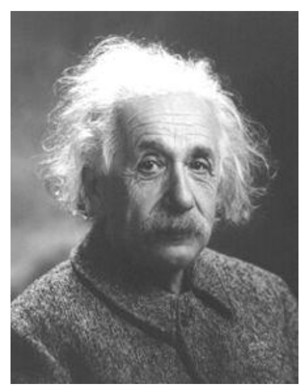
Also, this course contains strategies to help a PM get members on board and productive faster whether they are replacements for existing team members or new adds to the team.

Introduction

"Project Performance Secrets – Success *in spite of* your experience" – what do we possibly mean by 'in spite of your experience?'

What we mean is this: *describing a project manager (or anyone for that matter) with twenty years' experience does not automatically mean there are twenty years of progressive learning although that is what everyone assumes when they hear the number of years. It may be that their learning curve peaked after three years and the last seventeen have only been a repetition of year three!*

Also, we humans have a tendency to solve (or try to solve) new problems with old remedies. We look at the new problem and try to determine if any part of it is something we have encountered before. If so, we apply the familiar remedy and hope to solve part of the problem which still leaves the unfamiliar piece unsolved. We may experiment with other remedies or try the familiar one again in case we missed something the first time. The unfamiliar may go unsolved until it either fixes itself or goes away. Rarely will we try something new – especially if we have many years experience! It's like the old saying – *if your only tool is a hammer, every problem looks like a nail.*



Albert Einstein is credited with saying (paraphrased), *"Insanity is doing things the way you always have and expecting different results."* For many people, when familiar activities do not produce the expected results, they try harder *doing the same things* that led them to their current predicament. That is why we say "in spite of your experience."

Read this following situation and ask yourself if it sounds familiar.

A project kicks off with a good scope, schedule, and budget with all of the principles agreeing, "Yes! That's what we want to do."

Inevitably, though, it grows larger beyond all initial estimates and problems begin to surface. Since the experienced PM wants to protect his or her reputation and deliver the project on time, within budget, and meet all client expectations regardless of the changes, he or she will be reluctant to add team members (negative budget impact), adjust the schedule, or negotiate with the client about reduced expectations. He or she will exhort the existing members to work harder and longer. Translated to mean, *"Keep doing the things as you always have – just do more of them faster!"*

Naturally, this only fuels more tension-based conflicts between team members as their normal tolerance with each other diminishes with the increased workload. Burnout appears, errors increase, the schedule starts to slip as the budget expands, and the once-agreeable project principles begin to grumble. Finally, the PM admits the project ship is about to hit the reef and over-reacts by throwing resources at the problems in hopes something works. The schedule and budget are certainly blown by now and the client expectations are in jeopardy. The unhappy client says to the PM's executives at the end of a contentious conference call, "I thought you said he (she) was experienced!"

What went wrong? There was probably not a single obvious event that could be dealt with but hundreds of small performance issues that accumulated to hurt the project. If the PM had been able to look past his or her previous experience and consider doing things differently – which will lead to different results – they may have been able to avoid the problem.

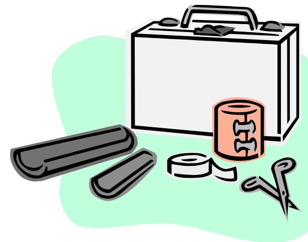
This course is based on the premise that small performance issues within a project can have the same catastrophic outcome as could occur within a large mechanical system like an airplane. If a mechanic does not tighten a critical bolt on a fuel pump sufficiently during routine maintenance - a human performance issue -it may begin to vibrate and cause a small leak in a fuel line connector. The leaking fuel accumulates in a compartment where it eventually overflows. It drips into a cable chase leading to a bare wire in the electrical harness and so on until the airplane explodes.

Project performance problems are like that loose bolt. Rarely are single events the specific cause of a problem on a project. More often, it is an accumulation of a lot of small ones that eventually reach critical mass and something happens. That small performance problem may be a bad decision based on erroneous data; poor maintenance caused by inadequate training that contributes to a safety issue or an overall deterioration of morale due to poor leadership skills. Each of these may ultimately lead to declining team performance and the project suffers.

Consider the project example we described earlier. Even if the PM were willing to bring in additional players when he or she first saw the work expanding or changing, there would still be downstream issues associated with making that decision. Plus the lag time between a decision to act and the result of that action on the project. And, the longer they wait to act only makes the potential for trouble increase exponentially.

We will explore some things that a PM can do as preventive maintenance as insurance against the little things accumulating into a disaster.

YOUR PROJECT EMERGENCY KIT

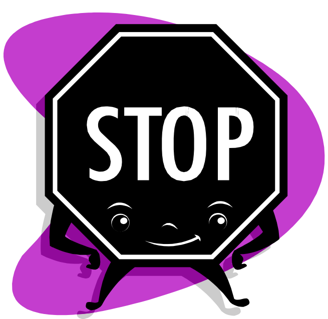


Consider this: suppose you are a project manager who distributes the questions that follow in this course under the various "Secret #" headings to the leaders of the various departments or functional groups within your next project and they take time to answer them *before the project starts.*

Then they put them into a binder kept in their area called "Project Emergency Kit" (or something similar) for use if any performance problems begin to appear.

We believe that addressing these critical questions before the project starts can help you as a PM and them as a functional group leader in at least three ways:

1. It will help you identify and effectively deal with the small performance problems that can accumulate and become larger ones
2. It will provide an excellent "Project Emergency Kit" for guidance if a substitute has to step in to fill a key project role temporarily
3. It will help speed the assimilation of a new team member in that functional unit if you have to increase the size of the project team. This reduces the time-to-productivity lag and protects your schedule (and reputation.)



Please note that while the new team members are fully competent in a technically-skilled sense, they still lack the social network and unique history of the project to fit into their positions fully. *Until they can apply their technical skills comfortably and effectively within the context of the work environment's social and political culture, they are still not fully productive.*

In the real world, we know that success on a project is expected. "That's what we pay you for" is the response and all temporary good feelings for a well-run project are replaced soon with an attitude of "what-have-you-done-for-me-lately" by management. ***Failure, however, assumes a life of its own and takes a long time (if ever) for it to fade away.***

PROJECT PERFORMANCE SECRETS

The questions that follow are about issues that may be so subtle that they are likely to be overlooked in the daily workings of a busy project. The issues upon which we focus are the project performance secrets waiting for discovery – or disaster!

These eight secrets can contribute positively or negatively to project performance and are hidden within typical project issues. We will expand on each secret individually after we have introduced them all.

Secret #1 - What are the job functions or work processes within the various project *components* that could tell us if this portion of the project is not be running as smoothly as we think it is?

> Project components are work groups like accounting, document control, safety, drug testing, filing documents, human resources, engineering, drafting, surveying, vendor relations, permitting, etc. A job function within the component called Project Accounting may be "Accounts Payable."
>
> We recommend you consider all functions in the project, not just the ones *your experience* tells you are the most important. Once you have identified all of the project functions, think about applying secrets 2-6 within those job functions

Secret #2 - What are the reliable indicators within those job functions or work processes that could tell us this isn't a temporary aberration in performance and we need to pay attention?

Secret #3 - What are the trip wires within those indicators that will tell us to ACT NOW!

Secret #4 - Once we decide to act, where specifically should we apply the remedy so as not to create new problems while trying to fix the old ones? Or to apply a remedy in such as hap-hazard fashion that we waste time and project resources!

Secret #5 - If the problems are related to work performance beyond the issues of secret #4, we must decide:

- Is there too much work for the staff available?
    - Before saying, "There is too much work", how do we know they are working as productively as possible? There is a difference between being productive and just being busy but can we tell the difference?

    - Are there invisible obstacles to optimal performance within our work processes? If we can identify and remove them, we may discover we DO have sufficient staff for the work.

- If we are satisfied there are no hidden obstacles to optimal performance and the existing staff is fully productive, then we really need additional staff. If so, where exactly will we find *competent* help?
    - Who do we ask to help us find it?
    - How can we help them find the best fit for our project?

Secret #6 - Once that competent help is found, <u>how many days</u> will it take to conduct interviews and select the ones we want?

- What kind of questions must we ask to make sure they are a good fit for the position and existing work team?
- How much latitude will we have in bringing them aboard the project?

Secret #7 - Once selected, <u>how many days</u> will it take to get them here at the project?

- Is there anything we can do to speed the process of getting them here?
- Is there anything we can do in the interim to keep the work moving?

Secret #8 - Once physically here, <u>how many days</u> will it take them to become productive?

What kind of tools or aids can we provide to speed their assimilation?

Eventually, we have them at work on the project many weeks or months after we decided we needed help. (Warning: the time-to-productivity lag will always be larger than you anticipate.) Meanwhile, the work is still getting behind and the payroll has swollen with the new hires. There will be no significant improvement in productivity until they become assimilated into the project. The new ones are slowing down the older ones as they ask for help with questions about whom to call about an issue, where do we find the forms we need, who gets this, where do I find something, etc. This on-the-job-training for the supplemental team members gets in the way of the older ones trying to maintain productivity. This increase in new staff actually may hurt, not help, the tension between team members.

This course will look at secrets 1-8 on the previous pages in greater depth to help project managers prepare better for the time when projects begin to grow unexpectedly and there is a sense of lost control. Although we will assume a large project in this course as we describe the steps involved, it is important that students not discount smaller projects. All of the topics covered in this course apply to projects of any size. Since your professional reputation is based on project outcomes, it is worth taking a few minutes to consider them all. Work slow-downs can create just as many problems on a project as can an outright work stoppage. Non-intentional performance problems with team members are rarely overt and obvious but can be just as costly. [“Non-intentional” meaning they did not know they were doing it incorrectly.]

Performance problems are usually routine (nothing exotic – just the same task they have always performed), frequent, small, and CUMULATIVE. Think of the buildup of barnacles on a ship’s hull that eventually reduce its performance. Each one is microscopic but collectively they are significant.

We do not expect the project manager to do all of the subproject component analysis that we describe in this course. It should be given to the leaders of those components since they know more about their area of responsibility and how it works than does the PM. The PM should recognize the need to look at these aspects, and then delegate the actual investigation to the various department or section heads.

They should report back to the PM when they finish. This report should be in place before the project begins and referencing it should be a small but permanent part of every project staff meeting.

SECRET #1

What are the job functions or work processes within the various project components that could tell us this portion of the project may not be running as smoothly as we think it is?

We must assume that each component (page 10) of the project contributes their output at expected levels of quality and quantity on a predetermined schedule. Using that premise, the section head of each component should ask himself or herself these questions about each of the job functions within their area:

If any part of our expected output was not going to meet project quality, quantity, or schedule expectations, when and how would we know?

Suppose your department produces a daily report for the project that must be sent out by 9:00 AM but for some reason it does not meet expected standards or does not go out at all. How would you know? Or, if it were an automated report that sends data without need for human oversight, how would you know if it did not go out or if it sent the correct data?

Your possible answers may be something like these:

1. *We would know immediately because we create it. If we cannot deliver the output by a specific time, we will know it first because (why?)*

   Other questions flowing from this could be:

   a. If we do our part wrong and we catch it, how long would it take to fix it?
      i. What would we do to fix it?
      ii. Is anyone else involved? If so, who and how do we contact them?
   b. If we do our part wrong and we do not catch it, how long would it take for them to discover it, tell us, and we fix it?
   c. What parts of our product can go wrong?
      i. Data – how?

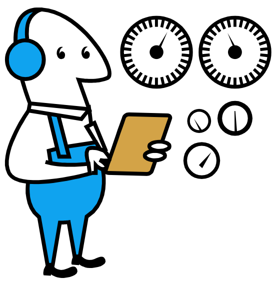
            1. What can we do to reduce the chance of that happening?
        ii. Supporting information – how?
            1. What can we do to reduce the chance of that happening?
    d. What or who are the sources upon which we rely to produce our output?
        i. Who by name (and contact information) are they?
        ii. How can we tell if we are receiving accurate information or products from our sources? (Describe this)
        iii. What do we do if they are not available to provide what we need? (Describe this)

2. *<u>We would not know immediately</u> because our product is a secondary (supplemental) product for someone else. Products from us (such as reports) would stop showing up somewhere.*
    a. How long would it take before anyone noticed?
    b. Once noticed, how long would it take us to fix it?
3. *What indicators in our workflows could we use to monitor how well our processes are working?* (Using the 9:00 AM report example above, you rely on data coming in from various sources to be in your office by 8:30 so you will have time to produce the report. If all of your source data is not on your desk by 8:30, that is an indicator that this piece of your workflow is at risk. If you didn't realize it was missing until 8:45 when you compiled all the data, it may delay your 9:00 deadline.)

List the indicators from #3 above and make the list available to all key team members within your section. Encourage them to add other indicators, if any.

SECRET #2

What are the reliable indicators within those job functions or work processes that could tell us this is not a temporary aberration and we really need to pay attention?



Pressure gauges within a power generating plant provide reliable indicators of steam line pressures. Technicians use those gauges to determine if things are running as expected or they need to start paying closer attention.

Work processes are very much like the steam lines in a power plant. Work flows from one station to another until it ultimately emerges as a tangible product or the data necessary for a decision. If team members are waiting downstream for a product or data, it is prudent for the functional work group to have ways of monitoring the flow of work on the project just like the flow of steam through the power plant.

We will continue using the 9:00 AM report example from #1 above. Suppose the data is supposed to be on your desk at 8:30 but today it arrives at 8:40. Although you still have time to use it in your report, it is still 10 minutes late.

We suggest you document the time of its arrival and then put the data into the 9:00 AM report as you normally would. A late report one time is an *event* but a report that arrives a little later every day or is late three days out of five becomes a *trend.*

We cannot tell you how many times it arrives late should be a cause for worry because we are not present on your project. The point we are making is that simply recording the arrival time of critical data every day is an excellent way to create a reliable process indicator that will give you a little warning before things get beyond control.

SECRET #3

What are the trip wires within those indicators that will tell us to ACT NOW!

Now that you are documenting when the data arrives that you need for your 9:00 AM report, you should set some "trip wires" that signal a need for action on your part.

For example, a trip wire may be <u>anytime</u> it is more than 15 minutes late (not there by 8:45 AM), you will call someone and start tracking it down. Or, if it arrives after 8:30 but before 8:45 any <u>two days in a row or any three days out of five,</u> you will call someone and ask if the delay is temporary or should you begin adapting your schedule or contacting those relying on your report to accommodate its late arrivals. The idea is to stay ahead of the action and not get caught by unexpected events or trapped into a situation that will cause a ripple effect of problems downstream from you.

SECRET #4

Once we decide to act, where specifically should we apply the remedy so as not to create new problems while trying to fix the old ones? Or to apply a remedy in a haphazard fashion and we waste time and project resources!

Let's explore cause-and-effect relationships for a moment. Typically, we assume our team members are capable of doing the right things and want to do the right things when given the opportunity. So, when they do things wrong, does it necessarily mean they chose not to do them right!

Unless they intentionally planned to sabotage the process, we must assume that something they relied on to be accurate or true was, in fact, not accurate or true. In other words, when team members make

mistakes, we should not ask, "Why did you fail to perform" because asking 'why" invites excuses, leads to confrontations, and gets us no closer to solving the problem. Instead, we should ask, "What led to your doing that?" This way, we are saying we realize there is probably a cause-and-effect relationship at work here and we want to discover what caused the failure to perform (the effect.)

Let's go back again to Einstein's definition of insanity – *You can't do things the same way you always have and expect different results.* In the example above, we want to know what led to the problem because, if we do not change the cause, we will continue to get the same effect.

Here is a step-by-step model that is very useful in tracking down the cause of a negative effect and allows you to surgically deal with a problem instead of a broad hit-or-miss approach.

PROJECT PERFORMANCE PROBLEM FLOWCHART

This flowchart will show you how 90% of the reasons for team member performance problems have their roots in systems or issues controlled by project management. Work your way through these ten steps and you will see what we mean.

Before you begin, ask yourself, "Is this issue worth pursuing?"

Question: How do you know if this issue is worth pursuing?"

If it interferes with your agreed-upon production goals, it is worth pursuing! If it is only a nuisance or aggravation, but does not interfere with production, it may be wiser to leave it alone

For example, if they do not do something the way you always have for 30 years yet they still get to the same outcome, is it really worth insisting they do it your way?

Or maybe they are not a workaholic like you and leave at 5:00 PM to spend time with the family.

If they are meeting their assigned goals, you will gain nothing by raising the issue or "dedication to work" and possibly lose a part of your valuable relationship with them.

If it is worth pursuing, go to STEP #1 below. If not, you are done! Remember, you can stop anytime in this process flow when the problem is ***"sufficiently solved."***

(We use "sufficiently solved" to mean it is not worth the time, effort, or expense to "fix it better.")

STEP #1
Ask yourself, "Are my expectations clear?"

Question: What do you say to your team member here?

"I want to make sure I did a good job of explaining my expectations. Please tell me what you think I expect you to do."

Notice that you are not asking, "What do you think I want you to do?" as if they did not understand. Some people may feel you are questioning their intelligence.

You are phrasing it as if you are not sure how well YOU COMMUNICATE WITH THEM.

If they do not understand, the responsibility is on you to clarify it, not them to ask for clarification.

If that is what <u>led to the problem</u>, change it, and you are done. If it is not, go on to the next step.

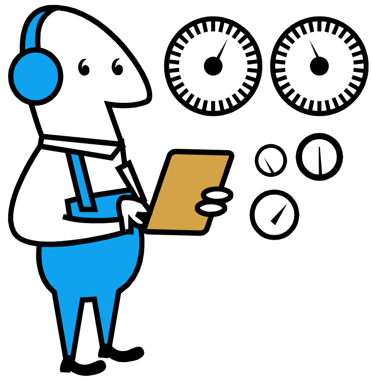
STEP #2
Ask yourself, "Are the resources adequate?"

Question: **What do you ask your team member here?**

("Do you have everything you need to do what I expect?")

If that is what <u>led to the problem</u>, change it, and you are done. If it is not, go on to the next step.

STEP #3
Ask yourself, "Do they get fast and frequent feedback on their performance?"



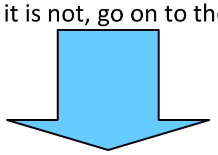
Question: What do you ask here?

("How do you know how you are doing?")

If they have a way to determine the levels of quality and quantity of their output and know whether it's on time without having someone else tell them, they are good.

If they do not have this ability, they won't know if they have to adjust what they are doing without someone telling them. Or a problem arises.

If that is what led to the problem, change it, and you are done. If it is not, go on to the next step.



STEP #4

Ask yourself, "Does the desired performance seem punishing?"

(Hint: What do you usually do if they finish early and **others have not yet finished?)**

Question: What do you ask your employee (or yourself about the situation) here?

"What usually happens when you finish an assignment early?"

If their "reward" for finishing early is you give them the work the slower people have not finished, you will soon have no one finishing early.

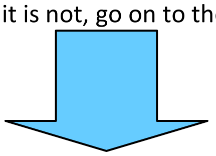
You must praise the ones who finish early, let them know you know they finished ahead of the others, and ask if they will help the slower ones.

This way they get praise, know you have noticed their work completion, and they do not feel the slackers are getting away with anything.

Otherwise, you are punishing them for their desired behavior of finishing early!

Step #4 and step #5 are opposites of each other yet very common in a production environment.

If that is what led to the problem, change it, and you are done. If it is not, go on to the next step.



STEP #5
Ask yourself, "Is poor performance rewarded somehow?"

(Hint: What do you usually do if **they have not finished yet** but others have?)

Question:
What do you ask your employee (or yourself about the situation) here?

"What do I usually do when this employee is getting behind and the other one has finished?"

This is the opposite of step #4. If they are behind, let them know you know they are not carrying their part of the workload and have to get the faster ones to help them.

This way, they realize they are not getting away with anything.

Otherwise, you are teaching them that they will get help if they work slowly enough. You are rewarding their undesirable behavior!

If that is what <u>led to the problem</u>, change it, and you are done. If it is not, go on to the next step.

STEP #6
Ask yourself, "Is there any penalty for not doing it right?"

Question: What do you ask yourself here?

"Is there any penalty for not doing it right?"

If there is no penalty for doing something wrong, why would they stop doing it?

If that is what <u>led to the problem</u>, change it, and you are done. If it is not, go on to the next step.

STEP #7

Ask yourself, "Is their non-performance a genuine skill deficiency?"

Question:
What do you ask your employee (or yourself about the situation) here?

"Can they not do it or can they do it but just do not want to?

This leads to a second question: Have they ever done this in the past?

(If so, give them practice to refresh their skills)
If not, continue to the next step.

If that is what led to the problem, change it, and you are done. If it is not, go on to the next step.

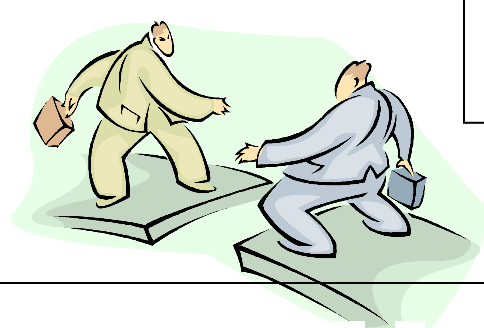
STEP #8
Ask yourself, "Can the task be made easier?"

Question: What do you ask here?

"Can you think of any easier way to do this?"

If that is what led to the problem, change it, and you are done. If it is not, go on to the next step.

STEP #9
Ask yourself, "Are there any other obstacles?"



Question: What do you ask here?

"Can you think of any thing else keeping you from doing this?"

If that is what led to the problem, change it, and you are done. If it is not, go on to the next step.

STEP #10

Ask yourself, "Does the person have the desire to change?"

Question: What do you ask here?

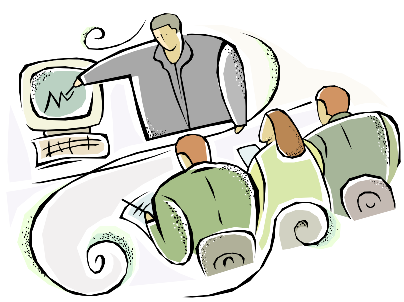
"What plans do you have to change your behavior?"

If you like their response,

go to the next step.

If not, REPLACE THEM!

Now train them to the desired skill level!
(From step #7)



Have you noticed that every step, except #10, is a factor controlled by project management?

Can you understand why we say this is a "surgical approach" to solving performance problems?

SECRET #5

Work performance problems beyond those covered in Secret #4

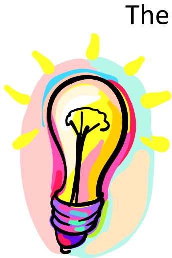
If we are confident there are no hidden performance obstacles keeping the team members from doing their work, we must next look at the nature of the expectations we have for the work. This is a further analysis of step #1 in the previous flowchart: "Are my expectations clear?"

If we have not defined our expectations in a way that leads to productivity instead of just "activity", they may be working at full capacity and still not producing what we need. Project leaders who require performance standards that include the three elements of productivity (quality, quantity, and time which are explained below) from all functional units will have a greater potential for overall project performance than those who do not.

PRODUCTIVE OR BUSY

Do you think a person can be very busy but not very productive? Tasks are not always productive. Sometimes people are just "busy."

However, when you focus a task with the three critical performance standards that define "how much," "how well" and "by when" (quantity, quality, and time), you establish goals and become productive.



The light bulb in a lamp is physically the same as a laser beam. However, the laser has all of its energy narrowly focused upon a particular point that gives it incredible power. How could you compare parts of your team member assignments to the light bulb and the laser beam?

When do you feel more satisfied with their work: when they are acting like a light bulb or a laser beam? Which condition ultimately makes your job more enjoyable and your work more productive?

How can you use the light bulb and laser beam example to stimulate a discussion with your team members? (Ask them, *"Are there times when your performance expectations seem vague and cause confusion or frustration for you when they are not as clear as they should have been?"* Remember their failure to perform as expected may stem from their leader's failure to define laser-like expectations.)

Think about this: suppose a person has spent two hours (the time element) completing six reports (the quantity part) using incorrect data (the quality component) for the project. Would you say they were busy or productive? Obviously, "busy" because the three elements of quality, quantity, and time were not present. You have wasted two hours of project time getting six reports that are useless (the quality component) because their mistake probably [with 90% confidence] stems from something their leader did or failed to do. Remember, WHAT LED THEM TO THE PROBLEM? (Review the previous secret.)

Nevertheless, if those same conditions were present and the correct data was used, the employee would have been productive!

PRACTICE ACTIVITY

Read each situation and put a checkmark under the appropriate "Productive" or "Busy" column. Remember, we define "productive" as having all three elements of how much (quantity), how well (quality), and by when (time) present in a situation. (Answers are on the next page.)

The situation	Productive	Busy	If "busy," what is missing?
*Grant has been filing project permitting reports for the past 45 minutes.			
Logan has spent three hours writing the RFP you requested.			
Murphy has the trenching machine running at a speed of 15'/hour and a depth as required of 8".			
Cindy completed 7 hours of the online training course last week,			

Describe a typical activity of your project that is busy but not productive because you have not been told the three components of productivity; quality, quantity, and time. Which of the three components is missing?   What will you do about it?

- *Grant is just busy because he has accomplished nothing. What are the “quantity and quality” measurements?

- Although Logan has spent three hours writing the RFP, is it the correct one? If so, is it accurate?

- Murphy has been productive. The three components are there which are required to define a trench: Quantity & time are expressed as “15’ per hour” and quality is assumed to be the depth because if it were not deep enough, we would have to do it over.

- Cindy completed the course but we do not know her grade (quality). If she failed, there is technically productivity because the “F” is a quality grade. But if it is below our acceptable standards, she wasted 7 hours; i.e., she was just “busy.” If she received an “A,” she was more productive than if she received a “C.” (Of course in a pass/fail situation you are either productive or not. There is no range of productivity.)

The point of the productive-or-busy exercise was to encourage some analysis of the work expectations before saying, “There is too much work and we need to get some help.” As a PM, you must be satisfied the team IS working as productively as possible with minimal rework or false starts happening.

WHAT IS “COMPETENT HELP?”

If we are satisfied there are no hidden obstacles to optimal performance and the existing staff is fully productive, then you really need additional staff. If so, where exactly will you find *competent* help? This course cannot tell you *where* to look because that is unique to each project. You probably have a human resources recruiter to contact or someone through whom you work for staffing needs.

However, we can discuss *what* you want the recruiters to look for in a candidate for your project team. Whether or not you or a team leader participates in the interview for the new team member, you can still provide a list of desirable traits if given the opportunity to offer input in the selection. (We will assume that you participate in the interview and help you prepare for it.)

Preparing for the Interview

Many times, interviewers make the mistake of focusing on the technical skills relevant to the position instead of the behavioral skills necessary for the successful application of the technical skills.

For example, if you asked an Information Technology manager in a large corporation, “What skills and abilities are you looking for in the person who fills this programmer’s position?” they may look at you as if you had lost your mind and reply, “The ability to write program code, of course!”

Their interview questions would deal with the technical skills of writing code and not focus on the other critical areas that frequently mean success or failure working there. They would have missed some essential behavior skills and significantly reduced their chances of a successful hire.

Critical Non-Technical or Behavioral Skills

A team member who is a “good fit” for the position involves many critical behaviors and abilities that are more than the technical skills that first come to mind when filling a position on a project team. Here are some of the most obvious ones:

- **Multi-tasking skills** - It is rare that a team member only works on task within a project at a time and always in the logical sequence of events. In reality, data requirements or other expected inputs are slow in arriving sometimes, so a productive team member will shift attention to another task and work on that until their required data or input arrives.

  As a team leader, you must ask for examples of how they multi-task in their current position.

- **Schedule their work** – They must be able to meet interim task or assignment milestones and deadlines on their own as part of meeting the final deadline for the client. Ask for examples of independent work scheduling they have done on past assignments.

- **Work within a team effectively** – A project team, by its very nature, requires several people working together interdependently on their segments of the project and they must be able to get along with each other. Ask for examples that would make you think they are effective team players.

- **Work alone without close supervision** – This needs no explanation. Ask for examples when they did this and the outcomes.

- **Develop a relationship of trust and confidence** – This is essential when working with other employees in the project or data/information sources they contact frequently. Ask for examples of trusting relationships they have developed on past projects or assignments.

Think
about this

Using the above as a beginning, list any other non-technical skills you think the ideal project team member for a specific work group should have.

A Better Approach to Interviews

The smart project manager or group leader will start by looking at all of the behaviors required by the position to develop relevant interview questions and not be limited to asking technical questions about the skill only. This is why we just looked at non-technical skills.

The easiest way to do this is to start with a blank sheet of paper and consider the 20% of the position behaviors that account for 80% of the job that are not job-specific technical skills.

Note: If you have difficulty deciding which behaviors you desire, try looking at it from an "inverse viewpoint." In other words, what behaviors could cause **problems?** You may identify traits like these:

1. Frequently misses deadlines
2. Can't get along with team members
3. The clients don't feel comfortable with him or her on their project
4. Spends more time doing rework than creating new material

Therefore, you have determined that *meeting deadlines, working well with team members, work well with clients, and is careful when writing material to reduce the amount of rework* are desirable behaviors!

We will use the list we developed earlier starting on page 26 to continue this example:

The ability to:

- Multi-task
- Ask questions and listen effectively
- Schedule work to meet milestones and deadlines
- Work within a team effectively
- Know when to ask questions or escalate issues.
- Act as a consultant for the coworkers when necessary.
- Work alone without close supervision.
- Develop a relationship of trust and confidence with the team members

It is easy to see how developing a list like this helps the interviewer begin to develop behavioral priorities for the position and stay focused during the interview.

It is important to develop a printed list of questions that are asked of each applicant for a position to ensure:

- Each applicant has a fair opportunity for the position by facing the same questions asked of all other applicants
- The interviewer has a consistency among the interviews that will help him or her narrow the selection choices based on the different answers to the same questions
- The interviewer can provide documented evidence (if necessary) of consistency among the interviews for the position and questions asked were relevant to the position.

Identifying Specific Requirements

Now that the hiring PM or project group leader has considered the essential behaviors associated with this position, he or she can begin to develop more fully the minimal position requirements by considering what the successful candidate:

- Must have
- Must be
- Must know

Then, as a way to determine "tie breakers" in case of two or more applicants meet the minimums listed as "must have, must be, or must know", the mentor can list the "would like to have", "would like to be", "would like to know" characteristics that would describe the perfect candidate.

Be sure that your "would like" characteristics are clearly bona fide occupational qualifications (BFOQs) so you do not get into potential trouble regarding discrimination issues.

For example, if you would like an ideal candidate to have experience in training so they could teach some of the office processes to subsequent trainees that is clearly related to the position and would be safe to consider.

However, if you say it would be nice if they were single because they may have to travel frequently, you are asking for trouble because their marital status has absolutely nothing to do with the job.

The project sponsors could get into trouble if an applicant they did not select complained that the project discriminated against them for being married because they could not travel as required.

The key here would be for the interviewer to say in the interview, *"The job requires approximately 25% (or whatever is appropriate) overnight travel away from home. Would that be a hardship for you?"* and let the applicant decide whether it is a hardship.

INTERVIEW CLUES

Successful interviewers pay attention to more than just the answers they receive to their questions; they also look for clues during the interview to help them discover "the real applicant."

Useful clues to look for include:

- How well the applicant listens and responds directly to your questions. Do they expand and elaborate or just use a minimum of words? (Neither is necessarily better than the other is. Just think how well this personality will mesh with the work team as well as the job.)

- Whether you feel the applicant hears the real need or the question behind the question. (Do they grasp the nuances and subtleties of the question?)

- Whether the applicant asks you for clarification or more information. Are they really inquisitive and thoughtful about the position to see if they think they would be a good fit or just trying to get through the interview with as little risk as possible?

- How well they turn potentially negative information into positives. Sometimes asking a simple question like, *"In what areas would people who have worked with you say you could use some professional development?"* or *"Tell me about a mistake you made at work and what you learned from it."* These questions assume that no one is perfect and we all could stand to be a little better at what we do. If your applicant is reluctant to mention any, it may mean:
  - They see it as a weakness they want to hide
  - Their experience is more limited than their resume indicates
  - They really do not think they have any flaws.

  Obviously, you should think carefully about their answer – whatever it is.

- How well they relax and build rapport with you. Their ability to talk comfortably may have a bearing on how well they will interact with clients or coworkers.

- How the applicant handles the non-verbal part of the communication. Notice especially eye contact, body posture, and tone of voice. It should feel comfortable — that is, the applicant should look at you, sit in a relaxed (allowing for some nervous energy) and alert posture, and speak distinctly. You should not feel "over" or "under whelmed" by the applicant. Notice whether the applicant is sensitive to your enthusiasm, pauses, and energy level; and if he/she fits into the "feeling" of your work environment.

- How you feel after the interview. Do you feel enthused? Tired? Impressed? Friendly? Indifferent? Why? Perhaps those who may work with the applicant will feel the same way.

- How much do they know about your project, the organization, and the position? Did they show some initiative to find out something about you, too, or are they just passive and uninformed looking for a job?

- The language the applicant uses. Is it sophisticated, simple, practical, and appropriate for the setting? Did they try to name drop or dazzle you with non-relevant information? Was there more "sizzle than steak"?

- What kind of questions did they ask? Did they sound appropriate, rehearsed, or robotic? Were there thoughtful questions about responsibility, authority, job expectations, or your management style? Did they ask about professional development opportunities for them?

- Were the questions prepared or spontaneous? Applicants who have prepared written questions show organizational skills and assertiveness. <u>Notice also which questions the applicant asks first, because these are his/her primary concerns.</u>

When applicants ask questions, it is very important that you find out what is behind their questions. Never assume you know why they are asking a particular question.

To learn the most, ask questions that clarify the reasons they ask a question. If, for example, an applicant asks, "How much responsibility will I have in doing this job?" You might respond, "Is that important to you?" If the answer is "yes," ask "why?"

Alternatively, "How much latitude will I have in making decisions?" You could reply with, "That is a good question; why do you ask?" As always, your best approach is to probe.

For example, if the applicant answers, "Oh, I was just wondering," you might respond, "What sort of latitude do you feel is necessary to get the job done right?"

Although it may not necessarily be a bad sign when applicants ask no questions, you should keep an eye out for individuals who seem reluctant to inquire specifically about the position you have open. This is particularly important if the position requires asking many questions in a friendly manner to people critical to the project when trying to collect data. You need employees who can persuade others and acquire information easily, and a lack of assertiveness and curiosity can be a danger signal.

ESTABLISHING RAPPORT WITH THE APPLICANT

Greet them with a smile and lead him or her to a quiet, private place for the interview. Some interviewers make "small talk" at this stage easily and naturally. Perhaps the best way to begin a conversation is to prepare for it before the interview. Find a few things on the applicant's resume or application that you would find easy to discuss.

Examples might include:

- Where they went to school or any organizations to which they belong
- The type of industry or business with which they have been employed
- The geographical areas in which they have been living or working
- Job duties or responsibilities that caught your eye

For instance, you might say, "I noticed on your application you've been working in the financial industry...haven't new construction loans been booming in that part of the area?" On the other hand, "I was impressed to see that you speak Russian. How did you pick up that skill?"

CAUTION: Beware of creating a "halo effect" that makes them seem better than their qualifications deserve.

There are three advantages to this approach to for establishing rapport:

1. You put applicants at ease when they begin discussing their own background.
2. The interview begins quicker and you have a chance to find out more about your applicant earlier in the interview.
3. They will be pleased that you remembered something about them, and therefore will be more likely to trust you. This increases your chances of getting revealing, honest answers.

STARTING THE INTERVIEW

After the "small talk," it is time for you to be in charge. You can control the interview if you set the agenda before it really gets rolling.

For a first interview, you should explain what would happen. This alerts the applicant that you know where you are going and that you will be the leader. A simple agenda you can set is:

- **"First, I would like to ask you some questions so I can learn about you**" (and warn them you'll be taking some notes).

- **"Then, I'll tell you more about the job."** (When you are telling them about the job, remember to get your answers first so that you do not "telegraph" your job requirements. For a full discussion of this, see "Do Not Do This" beginning on page 36.)

- **"After that, you can ask me anything you like."** (Saying this helps a lot when applicants interrupt the interview with questions. You should be in control; if they interrupt too much, simply repeat your request that the applicant hold his or her questions.)
- **"Finally, we'll discuss what will happen next."** (This is the point in the interview at which you can sell them on the job and wrap up details for future contacts. See "Concluding the Interview.")

If you announce this agenda before you plunge in, your chances of remaining in charge and conducting an efficient interview will go up substantially.

Remember:

- "1'll Ask"
- "1'll Tell"
- "You Ask"
- "We'll Discuss"

Do Not Do This

Here are some things to keep in mind that you DO NOT DO during your interviews:

- Do not talk too much. Try to talk 20% of the time and listen 80%. (A friend once said that when God gave us two ears and one mouth, the intention was that we listen twice as much as we talk.) Keep your side of the conversation brief. If the applicant asks you many questions early in the interview, beware!

- They may have read interviewing books that teach techniques to get you talking because the more you talk, the more you will like the applicant. They are acting as if you are the most interesting person in the world. Their hope is you will like that and think they are smart for realizing it!

- If you find yourself talking too much in the interview, ask the applicant to hold his or her questions until the end of the interview. Ask short, clear questions, then LISTEN, ask follow-up questions and listen some more.

- Do not tell them much about your needs. Inexperienced interviewers often make the mistake of beginning the interview by describing the open position in detail, including the requirements for the person who will fill it. Or the applicant asks you to describe it.

Certainly, the applicant deserves to know the essential responsibilities or job description of the position for which he/she is applying. However, the more you tell them what you want, the more they will tell you they have it.

For example, if you tell them, "We need a person in this position who is a self-starter, can work independently, and documents well what they have done," what skills do you think they will tell you they have? In other words, applicants will always "tell you what you tell them to tell you." So be very careful that you do not coach them into telling you what you want to hear.

Do not withhold approval or create unnecessary stress. Be sure to avoid disapproving glances, frowns, sounds, or gestures that can only create stress in the applicant. This may cause them to focus more on not upsetting you than giving you relevant information.

The best stance to take is to listen actively and "stroke" the applicant's sense of self-esteem. Sincerely compliment the activities and accomplishments for which they are proud. Downplay the mistakes or negative experiences they reveal. In this way, applicants will feel more comfortable with you and are more likely to relax and provide truthful answers to your questions.

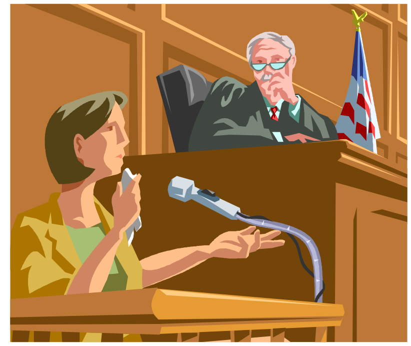
"Stress" interviews only prove one thing: whether the applicant can handle a stressful, manipulative interview. Unless the applicant's job will be to work under similar stressful conditions, do not infer that his or her reactions to such an interview shed much light on their ability to handle stress on the job.

On the other hand, if you can create a stressful situation very similar to one likely found on the job, the applicant's reaction should be a very valid piece of evidence.

Do not try to do it all yourself. Get in the habit of having at least one other person meet, and if possible, interview the finalists. Then compare your reactions with theirs and discuss how you rated their ability to fill the position requirements.

Even experienced interviewers miss vital information or are misled by personal biases. The best check against this is to compare your conclusions with someone else's. If you find a wide variance among the conclusions, consider whether another interview might prove worthwhile.

For complex positions, you might assign a few requirements to each of three or four interviewers. For example, one interviewer might concentrate on the applicant's technical background and knowledge base. Another would ask questions about his or her work habits, creativity, and organizational skills, and a third would explore the candidate's communication abilities and ability to work with others. This process works best when you have trusted interviewers who are particularly knowledgeable in their assigned areas.



Do not be too quick to judge. Restrain the natural tendency to jump to conclusions early in the interview. Something that sounds "dumb" may only be something you do not understand. Always paraphrase and summarize the applicant's key points aloud to make sure you really understand. When you are sure of something, write a quick note (a word, phrase, or abbreviation is fine) to remind yourself. However, try to hear another answer corroborating your first conclusion. The way to accomplish this, of course, is to ask follow-up questions.

Try to focus on what is right – not wrong – with them. This means that you should try to find out how he or she could make you a profit or provide better service or efficiency. What may seem like a huge "negative" in the first ten minutes of an interview may not seem so negative after you identify an exciting "positive" or two.

Some applicants start out "cold" — nervous energy or fear may inhibit their natural friendliness. Do not be impatient with them. Give each applicant a real shot at the job before you begin glancing at your watch or rushing through your questions. Once you act impatient, applicants will resent you and the tension level will rise in you both.

Do not try to remember everything. You will forget approximately 80% of the details of the interview within an hour of its conclusion. Therefore, you must write notes either during the interview or immediately after. If you take notes during the interview, here are two tips:

- First, tell the applicants at the beginning of the interview that you will take a few notes. You might explain it by saying, "I've got a terrible memory, and it'll help me remember you better later."

  This simple courtesy should help reduce suspicion and nervousness when you take notes. However, if you write too many notes it will disrupt the flow of conversation essential to a successful interview. Instead, write occasional, short, unobtrusive notes and fill in the details later.

- Second, do not be obvious about what you are writing. For instance, if an applicant says, "I guess my worst fault is coming in late too often," do not be too quick to write it down. If you write it down immediately, he or she will realize how damaging the remark was and will edit future remarks. Instead, ask another question (an easy question is best) and as the applicant is answering, nod and write a simple remark such as "says often late." With this method, you will not inhibit the applicant nor influence the interview by your note taking.

Some Warning Signs

Before the interview, take a few minutes to look for "red flags" in the resume or job application.

COPY THE APPLICATION. Never write on an original application or resume; your comments, "squiggles," highlighting, etc. could be used against you in legal proceedings if the application material were subpoenaed.

Then, circle on their resume anything, which seems overly general, vague, or suspicious. Note also misspellings, gaps in information such as dates or job duties and blanks left empty on the application form.

Some common red flags include:

- **"Rounded off" dates;** for example "1989," rather than September 1989
- **Non-specific educational information** - Did the applicant "attend" a certain college or "graduate" from the college? Did he/she study "general business" or "accounting and bookkeeping"? (Note: you are entirely justified in asking for a school transcript to validate education. Ask the applicant to furnish it; many schools will release transcripts only to the ex-student.)
- **Reasons for leaving past jobs** - People do not leave jobs for "better opportunity elsewhere" — they leave a position for specific reasons. Find out what the job they left was lacking. Ask what they wanted in a manager or organization or what developmental opportunities were lacking. If the "reason for leaving" was "personal," circle it and ask the applicant to explain. You have every right to know.

- **Lack of salary progression** - Perhaps a good explanation will be forthcoming why an applicant did not receive raises regularly in his/her career. However, it is a "red flag" until you are satisfied, that job performance incompetence was not the primary reason.
- **Lack of progression in job duties or responsibilities** - The best employees usually receive increased responsibilities if they stay in one position. If they change positions, their responsibilities typically increase as well. There may be exceptions to this—but you will not know the applicant's reason unless you ask.
- **Gaps in employment history** - Perhaps your applicant shows a year or two gap between jobs. Does this show a lack of initiative? Not necessarily. A woman may have taken time to have a baby. A man or woman may go back to school, travel, or work in a volunteer job.
  This "red flag" does not mean "no" — it means ASK and then judge. The "gap" may or may not be cause for concern.
- **Overly vague/general job duties or job titles** - For example, an applicant might write he or she "handled billings" as a job duty. Do not assume you know what that means; the "handling" could have been transporting the billing to someone else's desk! Similarly, are you sure you know what an "Administrative Assistant" does?
  Different organizations use this job title in very different ways, to describe duties ranging from secretarial to a mid-level management position.
- **Experience** – Make sure you understand the extent of their experience. As we mentioned earlier, <u>twenty years of experience does not always mean twenty years of increasing growth and responsibility</u>. It may mean they peaked after one year and spent the next nineteen years doing the same work over and over again.

After you have found the "red flags," you can use them at the beginning of the interview to clear up confusion and collect information quickly. The application can be your interview map — keep it visible during the conversation to keep you on track.

You might want to start by asking a few questions about the least recent jobs first, asking more questions successively as you get to the more recent positions.

CONCLUDING THE INTERVIEW

It is important that you conclude the interview quickly, cleanly and politely. In addition, you will want to do it when you are ready — whether it is after ten minutes or an hour and a half.

Here are some important steps in the process:

1. Make sure you have covered the entire list of requirements before you finish. Look again at the application or resume making sure you have asked questions about every job.

2. Be honest with yourself about whether you are interested in the applicant. If you are not, conclude the interview immediately. In any case, always finish with two questions:

   a. "I have no further questions. Do you have any questions about the job or our company?"
   b. "Is there anything else you'd like to tell me about yourself which we haven't discussed?"

3. Do not hesitate to “sell the project or organization” here and give them a good reason (or two) why they should want to work there.

Then, thank the applicant for applying and explain your notification process, step-by-step. Include whether the candidate will hear the results of the interview by mail or a phone call, and by when. If you do not want applicants to call you during this period, tell them.

Generally, it is a good idea not to tell applicants at the interview whether they will get the job. It will reduce your anxiety and the chances of legal trouble if you inform all applicants the same way -- after the interview. In addition, unless an applicant obviously does not meet a specific technical requirement, it is safest and kindest not to tell him/her at any time your reasons for not offering him/her the job. If you speak to him/her by phone, simply say, "We chose another applicant who we feel is a good fit."

Finally, if you are genuinely interested in the applicant, sell him/her on the job. You might explain your company benefit package first.

Then cover the benefits of the organization - its history, atmosphere, plans for the future, and how you want them to be a part of it.

Last, summarize the selling points of the job, such as growth, advancement, salary, and freedom to innovate.

With the best candidates, look them squarely in the eye and tell them their qualifications impress you and you will give them full consideration. Be sure you find out whether they have any pending job offers. After you determine your competition, if any, find out how long you have to decide whether to make them an offer and what factors might enter into their decision. That way you will know best how to present the job offer.

Shake hands and lead them to the door. Remember to smile and thank them for their time. You have successfully concluded the interview!

EVALUATING THE CANDIDATES

When you have finished interviewing the finalists for a position, collect all the available information — i.e., your notes of their answers during the interview, your observations, what the applicants' references said, and the observations and opinions of others in your organization who met the candidates.

To be consistent, you must evaluate each candidate according to the same criteria. Next to each requirement, rate the candidate by the following suggested method and indicate if your rating is based on documentation (D) they provided (or will provide) or experience (E) they described.

2= exceeds the requirement based on their experience or documentation

1 = fully meets the pre-set requirement

-1= does not meet the requirement

0 = applicant could not an provide example of this requirement

We will use the traits we mentioned earlier on page 26 to evaluate these three applicants.

Position Requirements	Grant	Proof	Ben	Proof	Logan	Proof
Evidence of the technical skills we require (you would specify all the technical skills you require and score them individually. This provides documentation that you were fair and consistent in your interviews and evaluations.)	1	D	1	D	2	D
	2	D	2	D	1	D
	1	D	2	D	1	D
	-1	E	0	D	1	D
The ability to multi-task	0	N/A	1	D	1	E
The ability to ask questions and listen effectively	1	E	2	E	0	N/A
The ability to meet milestones and deadlines	1	D	2	E	0	N/A
The ability to work within a team effectively	2	E	1	D	1	D
The ability to know when to ask questions or escalate issues.	0	N/A	1	D	1	E
The ability to act as a consultant for the client.	1	E	0	E	2	D
The ability to work alone without close supervision.	1	E	1	E	1	D
The ability to develop a relationship of trust and confidence with the client	0	N/A	1	D	0	N/A
Interview Score	9		13		11	

This is only a tool to help you organize your thoughts. It DOES NOT mean the highest score is hired.

Some Words of Caution

It would be wise to ask a Human Resources professional look over your list of questions to make sure they are all relevant to the position. If you are a small company without a Human Resources professional, try contacting the nearest chapter of the Society for Human Resources Professionals to see if they can offer help. (www.shrm.org)

Be sure that YOU DO NOT DO THIS:

- Do not ask questions about sex, race, religion, national origin, age, disability, marital status, ethnicity, or any other area that is protected by federal, state, or local statutes.

- Do not ask whether they have ever filed a complaint with E.E.O.C., for workers' compensation, or with a state labor commission. (Employees and applicants have rights to file these claims without fear of retaliation.)

- To comply with the American with Disabilities Act, ask all applicants a question similar to the following: *"Having been told or shown the job description highlighting the essential functions, can you perform this job with or without reasonable accommodation?"*

  Whether the applicants are able-bodied or have a disability, if they answer no, you do not consider them. If they answer yes, you continue to probe, including asking them what reasonable accommodation would allow them to perform

- Some job applications ask, "Have you ever been known by a different name?" If they answer "Yes," discover the reason for that in the background check. They may have changed it for religious reasons. Since religion is RARELY relevant to job qualifications, you would be wise not to comment on that during the interview for fear of possible claims of discrimination later if you do not select them for the job.

- In addition, if it is an unusual name, DO NOT MAKE A COMMENT! If you do not select them, they may think their name (i.e., ethnic background, nationality) was a factor and claim discrimination.

Developing Relevant Interview Questions

Earlier, we talked about the need to identify behavioral skills (or traits) associated with a position you are trying to fill as well as technical skills (page 26) for a successful interview.

Once you have identified the behaviors and traits that are critical to the position, you can easily frame questions around them that will draw upon the applicant's experience and help you determine their fitness for the position. Although we believe the thinking behind most of these questions is self-evident, we have elaborated on some for clarification.

BEHAVIORAL TRAIT	QUESTION BASED ON THAT TRAIT
Ability to Learn	What situations have you had in the past when you had to teach yourself how to do the job? If you could acquire a new skill or piece of knowledge, what would it be?
Ask Questions	Describe a time when the success of your project depended on your ability to ask questions and dig out relevant information.
Career Growth	How do you know when you have outgrown a job and it is time to move on? What growth would you expect in a job like this?
Conflict	What are examples of workplace conflict that you seem to encounter most? What situations at work seem to get you irritated most easily?
Consultation	Think of a time when you had to act as a consultant for a client. What was the situation? What difficulties did you encounter and how did you overcome them? What did you learn? [Problems when dealing with clients typically result from poor communication skills when requirements or expectations are not clearly defined before hand.]
Creativity	Give me an example of when you demonstrated creativity in your job. What is one thing about your current job that seems to be very inefficient? [Do they look for ways to improve the job or just put in time while being inefficient?]
Decision Making	What are the typical criteria you use when making decisions? [Do they say something like the "end justifies the means" or do they mention legal, ethical, and moral considerations?] What is the biggest error in judgment you have made in a past job? [Can they admit to making mistakes?]
Dependable	What from your past would lead us to think you are dependable? Give me an example of a time when it was most difficult for you to be dependable. [Were they a 'victim' or able to overcome the situation?]
Escalate Issues	Think of a time when you needed to escalate issues for a decision or a resolution. What was the situation? Why were you not able to deal with it? How did you deal with the outcome?
Flexibility	Give me an example of a time in your past when you had to be most flexible to accomplish the tasks. How would you deal with a situation where there seems to be frequently changing priorities? [You may see fear in their eyes and they may ask you, "Is it like that here?" You can reduce their fear and regain control of the interview by saying something like, "Sometimes, every organization has times like that. How would you deal with it?"]
Goal Achievement	What factors do you take into consideration when setting goals for yourself? If goals seem unachievable, what do you do? [Do they negotiate trying to modify the goals or just blindly chase an impossible goal?]
Initiative	What ways have you found to make your job more interesting?

BEHAVIORAL TRAIT	QUESTION BASED ON THAT TRAIT
	How were you able to overcome unexpected obstacles to a project you were working on?
Milestones & Deadlines	Describe a time when it was critical that you set a series of milestones and deadlines to meet client expectations. What events came up that threatened making those milestones? How did you deal with those events?
Motivation	How do you motivate yourself for the job on days when it is hard just to get out of bed? What elements of a job do you find most rewarding?
Multi-Tasking	Describe a time when you had to multi-task. What were you doing? How did you determine priorities? What problems did you encounter?
Problem Solving	What kind of problems are you uniquely capable of solving? Why do you think so? What process do you follow when trying to solve problems?
Punctuality	What do you think are justifiable and unjustifiable reasons for employees to be late to work? How would you last supervisor describe your punctuality?
Stress Management	What elements of a job do you find particularly stressful? How have you been able to deal with the inevitable stress associated with a job like this? [Do they do anything to help themselves or just suffer through it?]
Team Work	Describe a time when you were part of a work team. What difficulties did you encounter and how did you overcome them? What are some difficulties typically involved with working on a team?
Time Management	Describe a busy day in a past job. How would you organize your time and get everything done? [Do they mention reserving and protecting time or do you get the impression they feel events control them?] Where did you seem to waste then most time in your last job?
Trust & Confidence	Describe a time when it was critical that you develop a sense of trust and confidence with a client. What were some of the obstacles facing you? How did you overcome them?
Work Alone	Why would we think you could work alone without close supervision? From a manager's perspective, what do you think are some of the biggest challenges of having employees reporting to you that you do not see on a regular basis? [Issues of accountability frequently arise here. Listen for comments about clearly defined expectations and feedback loops where the leader gets data about the work performance without having to physically be present to observe.]
Work Load Management	Describe a time when you were at your maximum with work. How did you keep from getting additional tasks without missing any deadlines or causing ill will? [Do they acknowledge there is a limit to the amount of work someone can do at one time or do they continually accept new tasks? Did they work with their leader to establish priorities or risk missing deadlines?]

Help Your Recruiter Help You

Although it is the recruiter's job to find the applicants (after you have provided them with as many specifics as you can about the particular position), you can help to speed the process a little by suggesting places to look:

- Professionals associations - particularly if there is a local chapter (website)
- Any periodicals which people in that specialty read
- The names of any networking groups
- Are there any industry conferences coming up your recruiter could attend
- Any local employers using this specialty

Secret #6

How Many Days to a Selection?

There is not much we can offer here because each project environment is unique regarding its staffing issues.

However, the premise of this course is to help you become aware of project performance problems as quickly as possible; to help you make a decision on when to act; and once that decision is made, to provide specific information about your needs to the recruiter so they can bring your selection to the project as quickly as possible.

Based on that, we still can make a few practical suggestions to give you as much control over this entire process as possible.

1. Put strong emphasis on your functional group leaders to make sure they understand the concept of the “trip wire” (page 16, Secret #3) because you cannot start helping them until they realize they need the help and ask for it. Encourage them to make a decision to act (or at least bring it to your attention) when that trip wire goes off because of the enormous time delay inherent in getting competent help on a project. Make sure they do not see asking for help as a sign of weakness or inability to manage. (Although that may be the case in reality, but right now, you need to know what led to the problem – not remind them of their shortcomings.)

   Be sure to tell them that you would rather hear a few false alarms about needing help rather than have a problem catch you by surprise. Remember, they want you to see them as fully capable of running their departments and may be reluctant to say anything about possible problems. You may be saving yourself from a disaster in the future if you make it easy for them to tell you about their concerns whether real or imaginary.

2. As a project manager or functional group leader, stay in touch on a regular basis with your staffing resource to make sure you are current on how long it could take to find a replacement or an addition to your project for the <u>specific job function</u> IN CASE YOU NEED ONE.

   Keep in mind that the talent pool from which they draw candidates is dynamic and varies in size with the activities and demands in the labor market. Also, there may be other employers in the area competing for this same talent. This means the time lag from identifying a particular talent need until filling it will vary <u>across specialties</u> based on market demands. The length of time to find and select an accountant may not be the same as for a C++ programmer, a drafting technician, or a safety specialist, etc. This time lag will change constantly

   And, the timing may vary <u>within a specialty</u> (such as accounting or programming) overtime, also. For example, it may take longer to find help in accounting during the tax season than it will before or after it. <u>Do not</u> accept a common number for all positions because it may lull you into a false sense of security. Simply accepting “30 days” from the recruiter to fill a position does not tell you much. What kind of a skill were they referring to? Be sure to understand the time lag for each type of position.

SECRET #7

Once Selected, How Many Days To Get Them Onsite?

This secret is much like the previous one in that there may not be much as PM can do to speed the arrival of the help you need but you can begin to make their assimilation easier once they arrive.

Things like this are very important to people new to a community and an employer:

- **DON'T FORGET THE SPOUSE** – can you make recommendations about local employers if they are employed in their current location?
- "Here are some places we use…" Ask the current project team for names of daycare, doctors, dentists, churches, shopping, places to live, etc.
- Stay in touch with your new hire during this time. If a senior manager can call and say, "We are glad you are coming!" it makes a world of difference.
- What about interim moving or living expenses? How can you make it easier for their transition? If you make them feel as if you are glad to have them join the team, their work product will be that much better when they start.

SECRET #8

Once physically onsite, how many days will it take them to become productive?

Unlike the previous two secrets which are, for the most part, beyond the control of the project manager or group leader, this secret is VERY MUCH within their control.

Think back to the first day of employment with your current employer. Although you had the technical skills they wanted, how long did it take you to feel as though you really “fit in” with your workgroup? At first, were you tentative about your work because you were not sure of whom to call for help or simply trying to learn the routines and culture of your new working environment?

Typically, a measure of *confidence* in ourselves within the work environment must come before maximum *competence* in our task completion (read as ‘productivity’.) Once we are completely comfortable with our surroundings and the people with whom we work, we can quit wasting energy on asking ourselves, “Is this how the boss wants this done? Will I be stepping on anyone’s toes if I do this or ask that?” We can relax and devote our total attention to the job at hand. That is when we become most productive.

So the secret here is to ask, *“What can we do to speed the assimilation of the new hire into the project team once we have selected them?”* We believe there are several things that can be done during the two distinct stages of their onboarding process:

- The time before they arrive
- The time after they are here.

BEFORE THEY ARRIVE

If a significant part of our new team member's assimilation into the project is tied to learning about the work environment and the people with whom they will interact, is there any reason we cannot put together an information package about the project and its team now and send it to them as soon as they accept the position?

Then they can read through it while waiting for the movers to come or read it at night at home while they work out their two week's notice with their current employer. Can you think of any reason not to start their learning about your project and its team *before* they arrive? (We can't either!) Here are some items we think you should include in your "Welcome Aboard" information are these.

THE PROJECT'S CODE OF CONDUCT

The Marines use "Semper Fi (delis)" ('Always Faithful') as a promise that they will not let each other down. The Ten Commandments guide Christians on their behavior. Even Colonel Sanders' "We do chicken right!" was a type of value statement that helped KFC workers and customers share similar expectations of chicken.

A very effective way to identify your project's values is in a meeting with the project principles, project department heads, and some 'high-potential' project employees before the project starts bringing aboard the rest of the staff.

Here is how you can present it to your audience.

YOUR QUESTION	DESIRED ANSWERS (Keep Probing Until You Get Something Similar To These)
"Do you think a code of conduct has value for an organization? For example, what value does the code of conduct called The 10 Commandments have for the organization called 'Christianity'?"	"It defines their expectations of each other. It gives them guidance for action where there are no specific rules and regulations". (And if there were such policy and procedure manuals, they would be so thick that no one would read them!)

Question 1

An example would be, “Do unto others as you would have them do unto you.” Many volumes could be written about fairness in dealing with other people in thousands of situations. (Lawyers call them case law.) Instead, that simple line of “Do unto others…” allows us to fit our definition of fairness to our situation instead of searching through some policy manual.

[Please let us clarify something before we go farther. This code of shared values is not intended to replace the compliance regulations required by government agencies; specifications and procedures required by insurance companies; or the policies from the Human Resources or Safety departments on the project. *It is intended to identify and publicize the unspoken expectations that we all have of each other on a project.]*

Unfortunately, even though these are traditionally unspoken, we still expect coworkers to be aware of them and comply with them. Then we get upset when they do not.

YOUR QUESTION	DESIRED ANSWERS
“Do you think our project qualifies as an ‘organization’?”	Yes, it is! You should get agreement quickly on this!

Question 2

YOUR QUESTION	DESIRED ANSWERS (Keep Probing Until You Get Something Similar To These)
“Do you think we could avoid some potential friction among team members if we could identify and publish a Code of Conduct for our project? If so, what kind of behaviors would we want in our Code?”	See below. Put them on a flipchart page so you can post them in the meeting for reference.

Question 3

You should get many suggestions with this question (#3) but they will probably distill down into thoughts like these:

- <u>Be reliable.</u> Get to work on time (or early); meet your promised deadlines (or earlier); and follow through on your promises to team members whether project related or personal.
- <u>Share knowledge</u> if possible and <u>ask for help</u> when needed.
- <u>Smile and be as friendly as you can</u>. We are all in this together.

- Consider your behavior as seen through the eyes of your peers. If they were asked, *"What is it like to work with you, what would you want them to say?"* Then be sure your actions would make it easy for them to make those comments about you. (Obviously, you expect they want something positive said about them.)
- Trust is historic. Team members have to learn they can trust you.

Some limitations you should consider while developing this code is the temptation for some to be 'preachy', too lengthy, or too much like specific rules that already exist somewhere else on the project.

Try to discourage this as much as you can because short, concise, and easy-to-remember statements are more likely to be used by the workforce. But, if they insist that is what they want, then give it to them because it is their project and they are agreeing (by arguing their points) they are willing to live by them. (This is all you were after, anyway!) [Ten to twelve items seems to be a workable number in the code - too many becomes another checklist.]

An additional benefit of having a project Code of Conduct is it helps the leaders at various levels within the project handle employee performance issues. If this were the code in use on your current project, a supervisor or manager (we generically call them 'leaders') could point to the "Be reliable" and "Trust is Historic" statements and ask (not TELL) the employee what do they think they are teaching teammates about their reliability by being late to work again.

This is a very subtle yet powerful tool for performance management. The smart leader never says, *"You broke a project rule by being late!"* because the tardy worker may view the project as some vague, authoritarian sort of presence inflicting a myriad of rules on him.

But teammates are not vague: they are very specific people with names and faces. "Letting our teammates down" has a much bigger impact on people than does breaking one of the Boss' innumerable rules. The Code of Conduct concept helps the employees self-manage their behavior without the intervention of their leaders. This tool helps to shift part of the management role as "cop" to the employee who now becomes self-regulated.

TESTING THE VALUE OF YOUR PROJECT'S CODE OF CONDUCT

We will assume you have been successful in leading the project team in the creation of their Code of Conduct. Here is how you can show them its value.

Ask them to think about the best project they have ever worked on in the past. Or, if some do not have much project experience, ask them to think about the best work team or sports team they were ever a part of. It can be full-time, part time, or volunteer - with their current employer or a previous one.

Next, collect their responses so they all can see them on a chart like this (next page) on the board or easel paper. These represent typical responses.

Traits of the best team I was ever a part of…	The impact of those traits on me…	The impact those traits had on my work…
#1 No one was finished until we all were. If someone finished early, we helped someone else.	I kept learning more about the work so I could "show off" by getting finished first. It increased my value to the job and department.	I could do many different jobs so I got a lot of OT. Also, it showed my boss the potential I had and he gave me some more difficult work (I loved it!)
#2 Everyone pulled his or her own weight. We did not tolerate "slackers".	I wanted to be at least as good as the guy next to me. I did not want my friends to think of me as a slacker.	High production and quality. I had very little rework because that would make me look bad.
#3 There were clear expectations about what the company wanted from us. We knew what we were expected to do. There was very little oversight by the bosses.	It gave me confidence because the boss knew I knew what was expected. I kept my quality and quantity of work high so she would not think less of me.	I looked forward to coming to work because it was doing something I could take a lot of pride in. It also showed her how little supervision I needed.
#4 When someone figured out how to do something faster or better, they were expected to show at least one other person. That way, we all got smarter.	It made me want to learn more so I could be seen as a team teacher, not always a "learner".	It was not long before my job roles expanded because I had shown I could do a lot. My increased value to the company helped me get promoted.

Using that chart as your reference, refer back to the code of conduct your group generated back on page 52 and ask them this question:

YOUR QUESTION	DESIRED ANSWERS
"How many of the items we mentioned in our Code of Conduct (gesture to it) would have been applicable in this composite "best team" setting you have described?"	(There is no set answer here other than the probability that some of the items they listed today were part of the best team they were ever a part of. This is because our desire for cooperation, reliability, and looking out for each other is part of our fundamental nature. We just need to be reminded of it sometimes.)

Question 4

You are working toward a connection between the potentially great memories they can have from this current project and their fond memories of great projects in the past. Be sure to tell them this can be just as great a project, too, if they will focus on that code of conduct in everything they do on this project and help new team members learn it, also.

If you can establish a code of conduct that gets published, posted prominently throughout the project, and referenced frequently from senior project leadership downward through the ranks, the team will be well on its way to a great project experience. Naturally, they will have you to thank for it!

IDENTIFYING TEAM MEMBER WORKING STYLES

You probably have many team members with whom you get along very well. Maybe it is the way they present their problem or the way they respond to your answers that makes you think you have a lot in common.

Additionally, there are probably many with whom you feel absolutely no connection and it is difficult to deal with them successfully. The reason may be that your individual *working style* –the way you interact with the world – is similar to some of your team member's working styles and very different from some others. Working styles have ***absolutely no*** connection to someone's age, race, gender, etc.

Before we can help you deal effectively with the various working styles within your group or its new members, it is important that you know what your working style is so you can identify others. Once you are able to understand the clues and characteristics of the four major working styles, it will become easier for you to become flexible in your approach to team members who display a different style than yours.

SELF-ASSESSMENT SURVEY

We all are *combinations of the four various working styles.* No one is a 'pure' driver or analytical - two of the four working styles we will introduce - that may just be their dominant characteristic. Depending on the situation, we may display different aspects of our individual style.

For example, at work we may allow the "take charge" aspect of our personality (Driver) to lead while after work, with friends, we may pull back the take-charge element and bring out the "friendly and feelings" aspect of us (Amiable). Please remember this – we are a blend of these styles and the one that we call upon most is our working style.

Select the response in the following questions which is most likely how you would respond at work. The answers are neither right nor wrong. Just base your responses on how you are today, not how you think you need to be or want to be in the future. Record your responses in Table 1 on page 58 and then put the totals of each response in the summary line just below it.

1. When talking to a customer or co-worker....

a. I maintain eye contact the whole time.
b. I alternate between looking at the person and looking down.
c. I look around the room a good deal of the time.
d. I try to maintain eye contact but look away from time to time.

2. If I have an important decision to make....

a. I think it through completely before deciding.
b. I go with my gut instincts.
c. I consider the impact it will have on other people before deciding.
d. I run it by someone whose opinion I respect before deciding.

3. My office or work area mostly has....

a. Family photos and sentimental items displayed.
b. Inspirational posters, awards, and art displayed.
c. Graphs and charts displayed.
d. Calendars and project outlines displayed.

4. If I am having a conflict with a co-worker or customer....

a. I try to help the situation along by focusing on the positive.
b. I stay calm and try to understand the cause of the conflict.
c. I try to avoid discussing the issue causing the conflict.
d. I confront it right away so that it can get resolved as soon as possible.

5. When I talk on the phone at work....

a. I keep the conversation focused on the purpose of the call.
b. I spend a few minutes chatting before getting down to business.
c. I am in no hurry to get off the phone and don't mind chatting about personal things, the weather, and so on.
d. I try to keep the conversation as brief as possible.

6. If a co-worker is upset....

a. I ask if I can do anything to help.
b. I leave him alone because I don't want to intrude on his privacy.
c. I try to cheer him up and help him to see the bright side.
d. I feel uncomfortable and hope he gets over it soon.

7. **When** I **attend meetings at work....**

a. I sit back and think about what is being said before offering my opinion.
b. I put all my cards on the table so my opinion is well known.
c. I express my opinion enthusiastically, but listen to other's ideas as well.
d. I try to support the ideas of the other people in the meeting.

8. When I make a presentation in front of a group....

a. I am entertaining and often humorous.
b. I am clear and concise.
c. I speak relatively quietly.
d. I am direct, specific, and sometimes loud.

9. When a co-worker or customer is explaining a problem to me....

a. I try to understand and empathize with how he or she is feeling.
b. I look for the facts pertaining to the situation.
c. I listen carefully for the main issue so that I can find a solution.
d. I use my body language and tone of voice to show her that I understand.

10. When I **attend training programs or presentations....**

a. I get bored if the person moves too slowly.
b. I try to be supportive of the speaker, knowing how hard the job is.
c. I want it to be entertaining and informative.
d. I look for the logic behind what the speaker is saying.

11. **When I want to get my point across to customers or co-workers....**

a. I listen to their point of view first and then express my ideas gently.
b. I strongly state my opinion so that they know where I stand.
c. I try to persuade them without being too forceful.
d. I explain the thinking and logic behind what I am saying.

12. When I am late for a meeting or appointment....

a. I do not panic, and I call ahead to say that I will be a few minutes late.
b. I feel bad about keeping the other person waiting.
c. I get very upset and rush to get there as soon as possible.
d. I apologize profusely after I arrive.

13. I set goals and objectives at work that....

a. I think I can realistically attain.
b. I feel are challenging and would be exciting to achieve.
c. I need to achieve as part of a bigger objective.
d. Will make me feel good when I achieve them.

14. When explaining a problem to a co-worker from whom I need help....

a. I explain the problem in as much detail as possible.
b. I sometimes exaggerate to make my point.
c. I try to explain how the problem makes me feel.
d. I explain how I would like the problem to be solved.

15. **If customers or co-workers are late for a meeting with me in my office....**

a. I keep myself busy by making phone calls or working until they arrive.
b. I assume they were delayed a bit and don't get upset.
c. I call to make sure that I have the correct information (date, time, and so on).
d. I get upset that the person is wasting my time.

16. When I am behind on a project and feel pressure to get it done....

a. I make a list of everything I need to do, in what order, by when.
b. I block out everything else and focus 100 percent on the work I need to do.
c. I become anxious and have a hard time focusing on my work.
d. I set a date to get the project done by and go for it.

17. When I feel verbally attacked by a customer or a co-worker....

a. I tell her to stop it.
b. I feel hurt but usually don't say anything about it to her.
c. I ignore her anger and try to focus on the facts of the situation.
d. I let her know in strong terms that I don't like her behavior.

18. When I see a co-worker or customer whom I like and have not seen recently....

a. I give him a friendly hug.
b. I greet him but do not shake his hand.
c. I give him a firm but quick handshake.
d. I give him an enthusiastic handshake that lasts a few moments.

Table 1 Identify Your Working Style

1 **a** Driver **b** Amiable **c** Analytical **d** Expressive	4 **a** Expressive **b** Amiable **c** Analytical **d** Driver	7 **a** Analytical **b** Driver **c** Expressive **d** Amiable	10 **a** Driver **b** Amiable **c** Expressive **d** Analytical	13 **a** Analytical **b** Expressive **c** Driver **d** Amiable	16 **a** Analytical **b** Driver **c** Amiable **d** Expressive
2 **a** Analytical **b** Driver **c** Amiable **d** Expressive	5 **a** Driver **b** Expressive **c** Amiable **d** Analytical	8 **a** Expressive **b** Analytical **c** Amiable **d** Driver	11 **a** Amiable **b** Driver **c** Expressive **d** Analytical	14 **a** Analytical **b** Expressive **c** Amiable **d** Driver	17 **a** Driver **b** Amiable **c** Analytical **d** Expressive
3 **a** Amiable **b** Expressive **c** Analytical **d** Driver	**6** **a** Amiable **b** Analytical **c** Expressive **d** Driver	9 **a** Amiable **b** Analytical **c** Driver **d** Expressive	12 **a** Analytical **b** Amiable **c** Driver **d** Expressive	15 **a** Expressive **b** Amiable **c** Analytical **d** Driver	18 **a** Amiable **b** Analytical **c** Driver **d** Expressive

Write your total score here:

Driver = _____ Amiable = ____ Analytical = _____ Expressive = _____

Working styles from *Personal Styles and Effective Performance: Make Your Style Work for You* by David Merrill and Roger Reid (Chilton, 1981)

Since there are four distinct Working Styles, the odds are only 1 in 4 that you'll encounter someone a lot like you but likely you will find some similarities because we are all mixtures in varying degrees of those working styles. It is obviously very wise to understand something about the rest the world if you want them to like working with you.

The Project Team's "Who's Who"

"Get your program! You can't tell the players without a program!"

Walk into any professional sports event and there are vendors out front selling programs that list the players' pictures, statistics, and other information about them. So why not develop a similar concept for your project team? Better yet, let me rephrase that to, "Would there be any value in having at your desk a project "players" program or reference that contained everyone's picture, some work-related data about them, and possibly even some personal information like hobbies, favorite sports teams, etc.?"
A page in your project's program (or "Who's Who") may look like this:

Name	Dick Grimes
Job	Team Development Facilitator
Dept:	Administration
Phone	123-456-7890
E-mail	Dick@ourproject.com
Working Style	Expressive
Hobbies	Sailing, fix-it projects around the house
Favorite Teams	Miami Hurricanes
"Count on me to be..."	Patient, good listener, creative
"I need from you..."	Reliability, honesty, willingness to consider the unconventional if "what we have always done" isn't working

The value of this for your current team is self-evident. Also, wouldn't it be very helpful to send it along to your new hire while you are waiting for their arrival? If you send the projects Who's Who guide along with an organizational chart of the project, it would help them see the bug picture much more clearly.

Finally, why not send to them a copy of the Working Styles information? They will be able to determine their style while having a greater understanding of the information in the Who's Who guide.

Here is more of an explanation about the value of including Working Styles in the Who's Who guide.

When dealing with Expressives be aware of this information:

When they feel pressured…	They attack
They measure personal value by…	Earning recognition
They need to do this for personal growth…	Learn to check details
Gain their cooperation by letting them save…	Effort
For best results, they need a work climate that…	Inspires them to their goals
To gain the most if spending time with them, be…	Stimulating
To gain their support of you, you must support their…	Dreams and intuitions
They see most benefit from answers that define…	Who
If you want them to make a decision, give them…	Testimony and incentives
Their specialty in an organization is…	They are "energizing"

A team member who has never met this person but who has taken the "Social Styles" class before the project would now have a very good idea of what I am like, how to approach me with needs or questions, how to enlist my support for their ideas, etc. Clearly, an approach like this is much superior to the traditional trial-and-error method so many project people use when getting to know their project team members.

Topics: Hobbies to "I need from you…" These topics simply allow us to provide more information about ourselves as human beings, not just our job title. This creates more opportunity and desire to network with someone from another department if I know something about them as individuals.

For example, suppose our project is relatively large and in a remote area. If I saw another Miami Hurricanes fan listed in the "Project's Who's Who", this gives me an opportunity to make a new friend.

But if we did not have a Project Who's Who (or something like it), my tendency would be to stay insulated within my little group and not fraternize with any outside of my group. This isolationism is the same mentality that sets up the "Win as Much as You Can" scenario so easily. The same isolationism that is found on so many projects that only focus on the scope of this project's mission but never add the phrase to the end of a mission statement: "And we cannot wait to work with each other again on the next project!"

DEMONSTRATING OUR WORKING STYLE

Our everyday behaviors can go a long way to identifying our style. If you are observant, you can pick up clues from:

What people say - How they say it

How they act - Their work environment

What People Say: How do you express yourself? Do you use colorful phrases, "down home-isms", or larger-than-life expressions, or do you tend to say things in a more modest, low-key manner? The types of words you use and the way you use them is a direct reflection of your working style.

How they Say It: Do you speak quickly in your normal mode and speed up even more when you get angry? Or do you speak slowly and distinctly and grow quieter if you get angry? Does you voice have a lot of inflections and tonal changes or does it stay essentially the same regardless of the topic? Is there excitement in your voice or more calm and relaxed? The way you speak tells people as much about you as how you say it.

How they Act: Have people ever said to you, "If we hold your hands, you won't be able to talk!" Do you gesture broadly when you speak or do they rest quietly in your lap or at your side while you speak? Do people have to move quickly to keep up with you or do you stroll at a leisurely pace? Your body movements are a very natural aspect of your working style.

The work environment: Do you have reports, files, and papers strewn over your desk or is it neat and tidy? Are pictures of your family casual or formally posed? What about the wall decorations? Are they achievement oriented (#1 in the golf tournament) or (attention seeking) "here's the governor and me at a luncheon?"

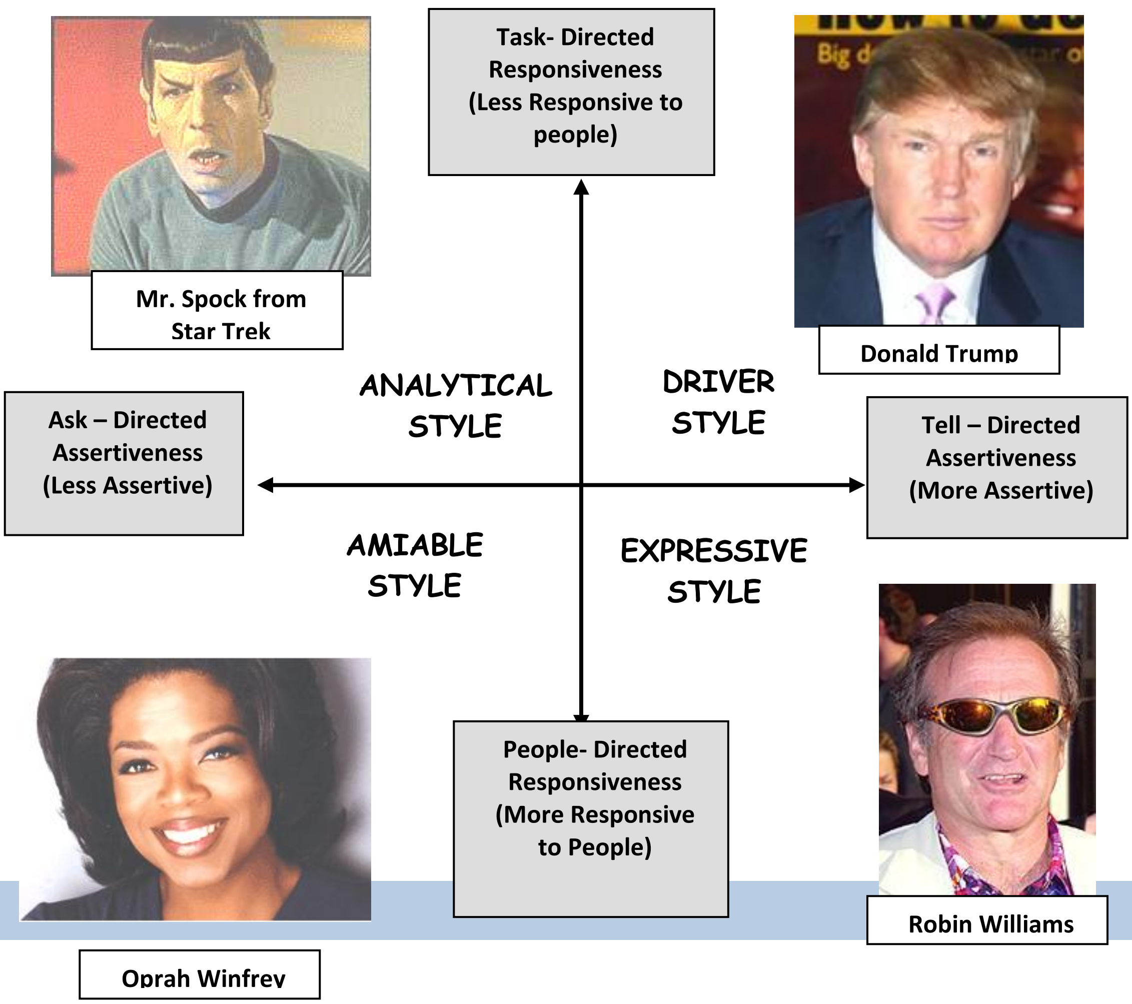
The office environment can tell a lot about the inhabitant to an alert observer.

THE WORKING STYLES GRID

The concept of Working Styles is based on where people fall along two behavioral ranges. These ranges address:

- How (or the extent to which) people ***assert*** themselves to others (outgoing communication meaning whether they typically 'tell" or "ask") and,
- How (or the extent to which) they ***respond*** to others with focus more on people or task issues.

Here is a grid to help visualize it and these are famous people who exemplify these traits:



THE ANALYTICAL STYLE

Although a fictional person, Mr. Spock of the original Star Trek fame is the classic example of an analytical (even to an extreme).

Their working style has a low degree of assertiveness (they listen more than they speak) and a low degree of emotional expression. People with this style *focus on facts more than feelings*. They evaluate situations objectively and gather plenty of data before making a decision. They prefer an organized work environment where they know exactly what is expected of them.

They are often perceived as deliberate, constrained, and logical. They tend to be good listeners who follow procedures, carefully weigh all alternatives, and remain steadfast in purpose. They are seen as disciplined, independent, and non-aggressive, and as people who are likely to let others take the social initiative. They may be perceived as conservative, businesslike, and persistent in their relationships with others. Strongly risk-averse and pursue their goals only after they have compiled plenty of data to support a project's purpose, practicality, and policy. For them, the *process* is as important as the outcome.

Here are some of the phrases often used to describe **Analyticals:**

- Seem technically oriented, often seeking structure, certainty, and evidence before making decisions (show them the warranty!)
- Appear quiet and unassuming; may show little emotion when dealing with others (they are listening much more closely than it appears)
- Tend to take little social initiative with others; may remain guarded until a strong relationship has been developed
- May push to extend existing ideas and procedures before going on to something new
- Will meticulously check every word and term in a contract or agreement before signing it

Their office environment probably includes:

- Minimal wall decorations. If there are some, they are probably off-the-shelf graphics, nothing frivolous, everything is utilitarian
- If there are documents on their desk, they are neatly stacked and everything looks orderly

- Family pictures, if any, are formal portrait settings, not candid shots of vacation, the dog, etc.
- There are probably charts, graphs, or other statistical measurements in their office.

Strengths of this style include:

- Seem able to approach problems on the basis of facts and logic and to create solid solutions
- Tend to make the most practical decision by being thorough and open to ideas
- Like to discover new ways of solving old problems
- Often productively competent in working out a problem and in getting a job done right

Growth opportunities for this style include:

- Realize that their need to collect data it makes it difficult to meet a deadline
- Their need to have zero errors makes it difficult to provide an estimate or make an off-the-cuff suggestion
- Their need for orderliness makes it uncomfortable when someone with whom they are working jumps from one topic to another randomly
- Their desire for structure and guidelines makes it difficult to be creative or spontaneous

Strategies for dealing with them

- Meet their need for data by providing charts, graphs, warranties, or statistics. Always check your data first because they will.
- Give them some room for error when asking for an estimate or opinion otherwise you will never get an answer because they are still collecting data. For example, ask for an estimate “with a 95% confidence level.” If you give them an ‘out’ (95% instead of 100%) so they do not have to be perfect, you allow them to reduce their inner drive for error avoidance.
- Set some preliminary milestones so you can check on progress instead of an all-or-nothing final date. Their drive for perfection and analysis of data may cause them to get so bogged down in the details they lose track of the overall schedule.
- Support their principles and thinking; provide evidence and service; and answers that explain HOW as often as possible.
- When explaining something, proceed in a logical sequence and do not make any leaps of logic.

THE AMIABLE STYLE

Oprah Winfrey has been called, "America's Beloved Best Friend" on the Academy of Achievement's website. Although very successful as a businesswoman, she has built her fortune on being perceived as a caring and friendly person.

She, as an amiable, is often seen as quiet, unassuming, and supportive. Perceived as a warm, friendly listener who seem easy to get along with, she attracts people who enjoy personal contact and shared responsibility ("teamwork" is something they enjoy.).

They tend to pursue goals by first establishing strong personal ties (first the personal relationship then the business relationship.) They may be perceived as avoiding risks and decision making unless they have strong support or data to back them up.

They like time to build relationships and to seek support and feedback from others before they make decisions ("Where do you want to go to lunch? What about you?" they will ask everyone in the group but make no decision themselves for fear of offending someone.)

They are very cooperative in their interaction with others because they want to be liked and "fit in'.

Phrases frequently used by people to describe Amiables like Oprah include:

- Seem to accept others, placing a high priority on getting along
- Appear quiet, cooperative, and supportive as they seek approval
- Seem easy to get to know and work with
- Tend to minimize interpersonal conflict whenever possible

Their office environment probably includes:

- "Happy" decorations including candid pictures of family & friends
- "Have a Nice Day" slogan variations
- Probably some clutter giving it a comfortable and homey feel

- Some emphasis on teamwork in an award, a slogan, or books on the shelf dealing with relationships and or communication

Strengths of this style include:

- May help others and provide positive strokes for other people's work and accomplishments
- May have a deep sense of loyalty and dedication to those in their work and peer groups
- Seem able to communicate trust and confidence in other people
- Function very well on teams and other social settings
- Tend to make people feel comfortable about themselves

Growth opportunities for this style include

- Amiables often have trouble asserting themselves and making decisions quickly.
- Generally, they don't like confronting disagreement with co-workers
- Must resist the temptation to base everything on feelings and more on results.
- Their reluctance to deal with conflict means that they do not always get what they really want.
- Their frustration about not resolving such issues can turn into resentment that is directed toward the same co-worker in later interactions.

Strategies for dealing with them

- Use a friendly tone of voice while making frequent eye contact and smiling
- They seek approval – provide it as much as you can.
- Use no aggressive or no dramatic gestures because this may be seen as unfriendly
- Speak slowly and in soft tones with moderate inflection (because that’s how friends talk with each other)
- Use language that is supportive and encouraging with guarantees and assurances

The Driver Style

Donald Trump is a billionaire real estate developer that has amassed a fortune through owning key New York properties (i.e. Trump Towers), and Atlantic City casinos. He has gained fame for his flamboyant deals, his run for President, and his supermodel love interests.

He is the consummate Driver because he is results-oriented, tending to initiate action and give clear direction. Drivers seek control over their environment and want to know the estimated outcome of each option when making deals.

They are willing to accept risks, but want to move quickly and have the final say. They love competition – especially when they win. In relationships, they may appear uncommunicative, independent and competitive and tend to focus on efficiency or productivity rather than devoting time and attention to casual relationships. They seldom see a need to share personal motives or feelings.

Drivers feel most comfortable pursuing their goals when they are in charge and taking the initiative. They are often seen as thriving in situations in which they can create plans and have others carry them out.

Drivers are frequently described as:

- Heartless, bottom-line oriented, will make direct eye contact as a way to intimidate to exert influence
- Able to move quickly and briskly with purpose while others hurry to catch up
- Speaking forcefully and fast-paced using terms such as will (not should), can (not try), and sounding very certain of themselves
- They seem to make things happen, take risks, and view problems as just another challenge.

Their office environment probably includes:

- Planning calendars and project outlines displayed in their offices
- Wall decorations include achievement awards ("#1 in the golf tournament)
- Furniture is "executive" style and of the best available (or best they can afford)
- Probably many communication methods available because they want to stay in touch, solve problems, and keep moving people ahead toward goals.

Strengths of this style include:

- The ability to take charge of situations and make quick decisions are what often make drivers high achievers.
- They put a single-minded focus on the goals they want and are not afraid to take risks to accomplish them.
- Often confident and strong-willed and like to initiate, control, and serve as own motivator
- Appear efficient, hardworking, results-oriented, and direct and to the point

Growth opportunities for this style include:

- When feeling stressed, drivers can be so focused on getting things done quickly that they can overlook details and make mistakes.
- They may push aside their own and other's feelings to get the job done, which can create tense situations with co-workers.
- Because of their hard-driving, competitive nature, drivers can sometimes become workaholics.
- Their failure to consider the feelings of others can drive off a lot of good employees from their organization

Strategies for dealing with them:

- Don’t waste their time – get to the point and be efficient
- Allow them to build their own structure when possible
- Give them choices between options and probabilities – allows them to be ‘in charge’
- They measure value by results – show them how your product achieves results

THE EXPRESSIVE STYLE

If the description of an Expressive is *"often excitable, fun-loving, and talkative; loves an audience and applause or recognition may be a cherished reward",* then Robin Williams is the perfect example.

They are motivated by recognition, approval and prestige. They are very communicative and approachable, while freely sharing their feelings and thoughts.

They move quickly, continually excited about the next big idea, but they often don't commit to specific plans or see things through to completion. They are better with strategy than the tactics needed for execution. Like drivers, they enjoy taking risks. When making decisions, they tend to place more stock in the opinions of prominent or successful people than in logic or research. Though they consider relationships important, the Expressive's competitive nature leads them to seek quieter friends who are supportive of their dreams and ideas, often making relationships shallow or short-lived.

Phrases like these are often heard when describing Expressives:

- Appear to be risk-takers, competitive, and spirited
- Often futuristic, creative, and inspirational
- They are out-going, spontaneous, persuasive, gregarious, and humorous
- The see the "big picture" but don't care much for the details
- Their approach toward projects may be, "Ready, FIRE, aim!"
- They think quickly and are more solution than process focused like Analyticals

If you had a large project, the styles would broadly work like this:

- The *expressive dreamer* lays it all out
- The *take-charge driver* leads it and makes it happen
- The *amiable team builder* keeps the workforce together
- The *analytical data manager* maintains the records and documents

Their office environment probably includes:

- Pictures that shout "look at me" such as with celebrities, unique locations (The Golden Gate Bridge), or exciting events such as skydiving. (The Driver's pictures would should competition or achievement like #1 in the golf tournament. The Expressive's would be *'Here are the Governor and me playing golf'*.)
- Bright colors
- Candid pictures of the family and their dog
- Many different projects or topics that they are working on

Strengths of this style include:

- Their lively nature allows them to motivate and generate excitement in others.
- They work at a fast pace and are good at building alliances and relationships to accomplish their goals.
- They are well suited for high-profile positions that require them to make public presentations, such as trainers, actors, salespeople, and so on.
- Like to share dreams and may stimulate creative exchange of ideas

Growth opportunities for this style include:

- When upset, they can often communicate their feelings with considerable intensity, and if criticized, they may lash out with a verbal attack.
- They may seem overwhelming to less assertive styles, because when they're enthusiastic about an idea, they press for a decision and may overlook important details.
- They may need to stay with a project longer than just the initial start-up phase to make sure everyone understands the concept
- Rely less on intuition at times and dig for more facts

Strategies for working with them:

- Start by focusing on generalities rather than on details.
- They usually respond well to playful people who focus on the big picture.
- It's important to make direct eye contact, having energetic and fast-paced speech,
- Be sure to allow time in the meeting for socializing, talking about experiences, people, and opinions, in addition to the facts

- Ask about their intuitive sense of things will help
- Support your ideas with testimonials from people whom they know and like
- Paraphrase any agreements made and maintain a balance between fun and reaching objectives

BACKUP STYLE

Many people, when under stress, usually revert to their "backup style" of behavior.

For example, back on page 63, you learned that people fall into two broad categories of assertiveness: more or less assertive. The more assertive types are the **Drivers** and **Expressives**; the less assertive one are the **Amiables** and **Analyticals**.

Under stress, people will become more of whichever assertive styles they are. The **Drivers** become more demanding (their controlling trait); **Expressives** attack verbally (their verbal and quick thinking abilities); **Amiables** give in and put their personal feelings aside; and **Analyticals** withdraw into a shell avoiding the situation.

How is knowing this useful for leading your project team members?

Working Style Flexibility

Earlier, we indicated that four distinct styles means that 25% of the world's working styles is like ours (we do not include ethnic, religious, generational, geographic, etc. factors but rather the basic working style as we have used in this course) and 75% is different.

This means if we can find a way to approach the other person *in a way most like their working style,* we increase the odds we can communicate effectively from 1-in-4 to perhaps 1-in-2 or 1-in-1 depending on our skills. *The greater our attempt to see the world through their eyes will make it easier to understand and lead them.*

Suppose you were an **Analytical** (Mr. Spock) having to deal with an **Expressive** (Robin Williams). From our guidelines on dealing with the various working styles, here are some of the strategies to use when working with them.

Expressive

- Start by focusing on generalities rather than on details.
- They usually respond well to playful people who focus on the big picture.
- It's important to make direct eye contact, having energetic and fast-paced speech,
- Support your ideas with testimonials from people whom they know and like

Analytical

- Meet their need for data by providing charts, graphs, warranties, or statistics. Always check your data first because they will.
- Support their principles and thinking; provide evidence and service; and answers that explain HOW as often as possible.
- When explaining something, proceed in a logical sequence and do not make any leaps of logic.

Can you see what a disaster it would be to use the **Analytical** approach of providing a lot of data and statistics first when an **Expressive** just wants generalities? Or when the Expressive just wants the "big picture" and the Analytical insists on the logical sequence without making any leaps of logic?

Flexibility means, “you temporarily adapt so you can be successful in the encounter”; *it does not mean becoming the other style.*

This is being flexible

The most successful anglers look at the world *from the perspective of the fish.*

They ask, *“What kind of water conditions, visibility, temperature, and light is best? What about time of day? Which is best, incoming, outgoing, slack, or flood tide? What is their favorite bait?”*

They do not try to become a fish!

Think of someone with whom you work and identify his or her working style.

- What clues do you notice?
- Based on those clues, what is their probable working style?
- How should you approach them?
- What is your working style? What potential conflicts are there between your style and theirs?

  What will you do to avoid these conflicts?

Be a Working Styles Detective

- Is the co-worker or customer ASSERTING his/her ***needs, wants, and opinions*** a LOT (Driver & Expressive) or a LITTLE (Analytical & Amiable)?
- Is the co-worker or customer EXPRESSING his/her **feelings and emotions** a lot (Expressive & Amiable) or a little (Driver & Analytical)?

AFTER THEY ARRIVE

These activities are for implementation after they arrive on the project *but which you have had in preparation since the project began.* The foundation for what we describe next is a variation of the Project Emergency Kit (page 9) and Secret #1 (page 13) that we discussed earlier when we asked you to focus on critical work processes for potential workflow early-warning problem detection.

We want you to look at those processes for another reason. This time, it is to help your new team member assimilate into the project much faster. Remember, although they are technically competent to do the work (you wouldn't have hired them if they weren't), they DO NOT KNOW how you do that kind of work on this project. They must learn the work flow, the social/political network, and the culture that makes things happen on your project as quickly as possible to become fully productive.

IDENTIFY A FUNCTIONAL WORK GROUP'S MENTOR

It is important for people who are new to a work group that there is someone waiting to greet them, make them feel welcomed, and help them get started on their new job. We'll call that position a "mentor" although what we will describe is a minimum of what a mentor would do in a more elaborate employee development program.

Things to think about when selecting a mentor for within a work group:

- A *friendly mentor* is more important that one who is technically skilled in the functions the new hire will perform. The newbie already knows how to do the work – they just don't know how to do it <u>on your projec</u>t. There will be a lot of questions and early mistakes as they work to fit in – which is why a friendly person is more critical than a technical wizard with no social skills when it comes to helping someone meld into the work group.

- What will become of the mentor's workload while they are helping the newbie/trainee? Try to arrange that they do not have to maintain their full workload while also trying to help the new member. Otherwise, being a mentor will seem more like a punishment than an honor and your best people will not want to do it.

THE LEAST THEY NEED TO KNOW TO GET STARTED

It is critical for a functional leader on a project to understand the value of assimilating this new talent as quickly and smoothly as possible without having them create more problems than they solve. The concepts presented here will get the new team member off to a safe start while gaining experience regardless of the size of the project. We mean “safe” as in avoiding errors that can create problems now or in the future.

The model for this is the typical high school drivers' education program where (in theory) you learn just enough to start driving safely with minimal risk to yourself and others while you gain experience out on the real highways. The reason for this least-they-can-do-to-get-started-safely method is that human beings typically learn through trial and error. What is the first thing we do when we see a sign warning us of wet paint? We touch it to see if it is still wet!

We learn about things best by doing them (or experiencing them), making mistakes, learning from the mistakes, and moving ahead with the new skills. The smart mentor will allow the trainee to make some small mistakes that will not do much damage but will help in the learning process. But if you try to teach them more than the least they need to know in an attempt to get back to your “real work”, you may be reducing their retention rate while spending time you (and they) could be doing on something else more productively.

We will talk a lot more about this later but, for now, start thinking about that concept: “what is the least they need to know to get started safely?”

What are the significant few tasks or routines they must know instead of the trivial many it would be nice for them to know?

Think about this

The significant few tasks or routines are what the mentor trains on allowing the trainee to pick up the other material as they gain experience. Remember, the more tasks the mentor teaches means that's less time available for the mentor to do their full-time job. That's why you select the significant few instead of the trivial many.

THINGS PROJECT MENTORS SHOULD DO

A sports writer asked Tiger Woods prior to a golf tournament what score he thought he would shoot. *"I'll play each shot as well as I can and let the score take care of itself"* he replied.

That is an example of focusing on the quality of the process and not worrying about the outcome. This is what mentors should emphasize with their trainees: that the project focuses on quality of work so it does not become necessary to go back and undo or fix something that was done in haste. Do not be concerned early on with productivity. As their comfort level increases and they feel more acclimated to the team, their production will increase.

Present the team's expectations like Tiger would, "focus on the process and the outcome will take care of itself."

Thirty days after the new team member is aboard, ask them to compile a **Start-Stop-Continue** list that the project can use to help future new members regardless of their functional unit.

The new member lists activities or anything they think the team should start doing to improve the assimilation process of new team members. Then they should make similar lists with what the team should stop or continue doing.

Finally ask for any comments they would like to make about the assimilation process that can be used for continuous improvement.

THINGS PROJECT MENTORS SHOULD NOT DO

These are some “not-to-dos” the author has collected over many years of training and helping technical experts develop training skills. How many of them have you used in the past?

- We 'show' them what to do without explaining the “why” and providing documentation.
- We provide little or no instructional material. (Are there non-sensitive sample reports that we could send to them before they arrive to familiarize them with what they will use?)
- We use jargon and acronyms without defining their meanings.
- We do not provide a list of “who-to-call” if help is needed.
- Other people or the telephone is usually interrupting the training.
- We forget they may be nervous and not able to retain everything we throw at them. (Just because they listen and watch does not mean it is sinking in.)
- Our training may not be consistent from day to day. (If training is not consistent, their comprehension and retention is not consistent.)
- We are in a hurry because our personal production goals remain even though we are trying to develop our trainee.
- We do not have a way of measuring learning to tell if they are making progress. (Ask them to show you how to do something you have just taught them. That way, you know they understood what you said and did.)
- We tell them all that we remember to tell them.
- We sometimes tell them all the things to do but forget to tell them the things not to do. (A trainee who tries to show some initiative may do something wrong because you did not tell them not to do that. Then, if you become upset, you will have taught them NEVER to try to act on their own again. That kills creativity and commitment.)
- We tend to pass on short cuts without first making sure they understand the longer method the short cut replaces. (Without knowing when to apply the shortcut, there could be some problems embedded in the appraisal process that we discover only at the worst possible time.)

Think about this: How does learning differ from training*? [Learning focuses on “gaining knowledge” while “training” focuses on ‘applying knowledge”. Employers do not pay employees just to KNOW things but to APPLY that knowledge in generating income].*

Why should the mentor know the difference? *[To insure a focus on trainee PERFORMANCE OUTCOMES – what they can do - not just how much they know.]*