REUTERS/Pawel Kopczynski

The Situational Project Leader:
Managing Up, Down and All-around

Joe Perzel, PMP
March 15, 2022

IIBA® Albany Capital District Chapter   IIBA® Albany Capital District
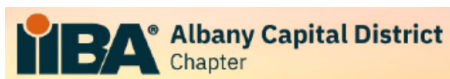
joe@jperzelinc.com - 612.801.0737 www.jperzelinc.com
https://www.linkedin.com/in/jperzel

JOEPERZEL
Speaker | Presenter | Workshop Leader

3/14/2022 8:46 AM © 2011

Agenda

- Background, Introductions, Assumptions, Definitions
- Basics of Leadership
- Influence and Politics
- Sales and Negotiations
- Typical Tendencies
- Final Thoughts

JOEPERZEL
Speaker | Presenter | Workshop Leader

2

© 2011

My Background

- Software development since 1979
- Business Analysis and Project Management since 1982
- Staff Management since 1983
- Program and Portfolio Management since 1989
- Worked on Business, IT/Technology, Operations projects
- Corporate, Not-for-profit, Government, Consulting & Staffing
- HealthCare, Government, K-12, Higher-Education, Financial, Agri-business, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance

JOEPERZEL
Speaker | Presenter | Workshop Leader

3

© 2011

My Background

Some of the Larger, More Complex Projects

- The management of a 7 month project to create and roll out a family of business products for a healthcare company
- The development of a PMO office and corresponding polices, processes and artifacts for a Higher Ed organization
- The 18 month roll-out of Office 365 across the enterprise, including the redesign and rewrite of the corporate Intranet site
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business
- The 3 year custom development project to design and create a multi-state workers compensation system that would be available for future "sale"
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- The Planning, RFP creation, product selection, deployment/support of a 3 year ITIL and monitoring operations system for a company requiring 99.96% uptime
- The management of a 2 year rewrite of a custom Sales and Marketing automation system for a global reinsurance company

JOEPERZEL
Speaker | Presenter | Workshop Leader

4

© 2011

My Background

Some of my presentations include:
- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- There are No Politics in Business
- How to Train your Dragon: a Project Sponsor Primer
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- Managing Change and Surviving to Talk about it
- The Art of Selling and Salesmanship: Tools Everyone Needs to Utilize
- The Situational Project Leader: Managing Up, Down and All-around
- A "Surefire" way to Ensure Schedule Performance!
- Managing Innovation in a Project Management World
- Joeisms: Leadership Concepts and Other Sage Words of Advice

✓**This should tell you a couple of things...**
- I find titles market & attract attention which leads to project success
- I can be irreverent, sarcastic and love debates; so comments and other opinions are appreciated
- I focus on the soft skills in project management

JOE PERZEL
Speaker | Presenter | Workshop Leader

5

Goal for today

SET GOALS

- Offer a set of tools and techniques to use to lead others, no matter what the setting, no matter who the audience is, and no matter your relationship to the other party(s)
  - ✓ I will do that by:
    - ❑ Presenting content and
    - ❑ Engaging you in a dialogue
    - ❑ Supporting my points with present-day, real-world examples, reinforced with exercises and case studies
  - ✓ And offering a bit of humor along the way

JOE PERZEL
Speaker | Presenter | Workshop Leader

6

© 2011

Defining Situational Project Leader

- The ability to recognize the situation, and to utilize multiple tools and techniques to provide the required leadership for success

- Different situations:
  - ✓ Circumstance: Group or individual / Informal or Formal setting
  - ✓ Organizational relationship to Stakeholders: peer, subordinate, executive
  - ✓ Personal relationship: trusted/respected, new/unknown, problem past

- Different Tools:
  - ✓ Gathering facts
  - ✓ Building relationships
  - ✓ Politics and Influence
  - ✓ Marketing and Communications
  - ✓ Sales and Negotiations

JOE PERZEL
Speaker | Presenter | Workshop Leader

7

© 2011

Definitions @

- **Project:** a temporary endeavor with a defined beginning and end
- **Process:** a set of activities that interact to achieve a result
- **Project Manager**: the person responsible for accomplishing the stated project objectives. (on time, on budget and with everyone smiling – jp)
- **Project Management**: the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals
- **Program Management:** the application of knowledge, skills, tools, & techniques to a group of related projects
- **Portfolio Management:** the centralized management of one or more portfolios to achieve strategic objectives
- **Project Sponsor:** a person or group who provides resources and support for the project, program, or portfolio who is accountable for enabling success

JOE PERZEL
Speaker | Presenter | Workshop Leader

8

© 2011

Assumptions

- Successful journey from start to finish of a project is not linear, clean, forecastable or easy
- Everyone has an agenda – not always the same agenda as yours, or the project Sponsor's
- Your interest is to deliver the project on time, on budget, with all the proposed features - with a smile on everyone's face
- All companies, departments and teams have their politics
- You can't change the way people interpret someone, the situation, an issue – or how they act/react
- The bigger and more complex a project, the more important being at Situational Project Leader is to be successful

---

The Situational Project Leader

Basics of Leadership

Leadership Options …
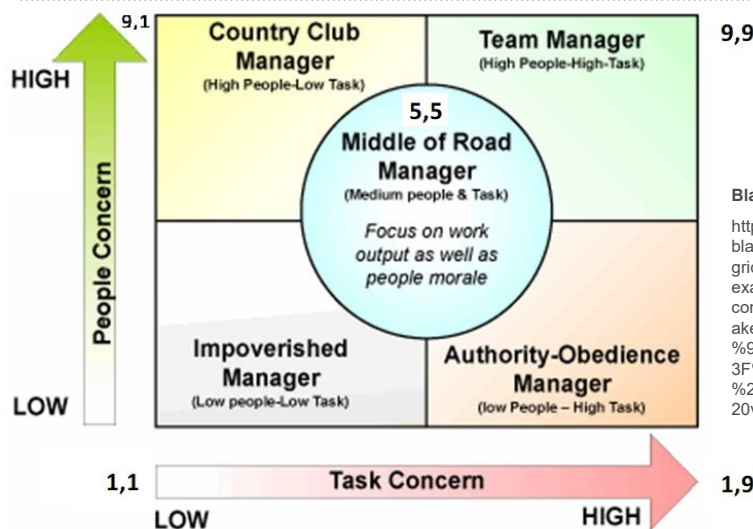
Blake-Mouton Leadership Grid

https://www.leadershipahoy.com/blake-and-moutons-managerial-grid-explained-by-a-ceo-examples-pros-cons/#:~:text=What%20is%20Blake%20and%20Mouton%E2%80%99s%20Managerial%20Grid%3F%20The,their%20levels%20of%20concern%20for%20people%20versus%20production.

Key Elements

- Gathering Facts
- Understanding People
- Excellent Communications and Adapting your Style
- Stakeholder Management

Asking a Question   @

- Know when to ask a question, and how to do it effectively, by asking yourself:

  ✓ Am I trying to build rapport
  ✓ Am I looking to gather information
  ✓ Am I looking to lead the discussion to a particular end-point or decision

© 2011

Asking a Question

- Will assist with…

  ✓ Finding out about an organization
  ✓ Stakeholder identification
  ✓ Building trust and respect
  ✓ Influence – gaining and retaining
  ✓ Validating important information
  ✓ Understanding people

© 2011

Don't "Fear the Silence"

- What to do when you "Fear the Silence" - remember 2 things:
  ✓ Some people need time to think before replying
  ✓ Silence can be a good thing - use it when necessary
    o Negotiations
    o Seeing what others are thinking before you commit
    o Letting other people step-up

Hint
  ➢ If necessary try a prompt or suggestion
  ➢ If necessary count to 10 in your head

© 2011

Validating

- How can you tell when a team member isn't telling the Truth
  ✓ ………………….……

- What to do?
  ✓ Ask a clarifying question
  ✓ Confirm in writing
  ✓ Play back what you heard for confirmation
  ✓ Ask the question again – a different way – as often as needed

Note:
  ➢ How can you tell when a Sponsor, other executive or SME isn't telling the Truth?
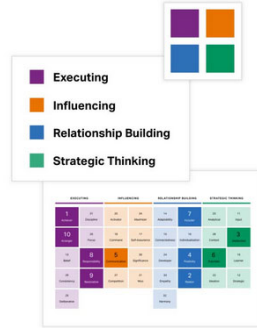
© 2011

Personality profiling

- It is the Art of learning about people
  - ✓ How they take in information
  - ✓ How they think
  - ✓ How they make decisions
  - ✓ How they communicate

- Some of the available tools
  - ✓ https://www.gallupstrengthscenter.com
  - ✓ What is DiSC - Overview
  - ✓ DiSC Preview Assessment
  - ✓ DiSC On-Line Full Assessment
  - ✓ http://www.suestockdale.com/different-types-of-personality-tools/
  - ✓ http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/
  - ✓ http://www.16personalities.com/

■ Executing
■ Influencing
■ Relationship Building
■ Strategic Thinking

JOEPERZEL
Speaker | Presenter | Workshop Leader

17

© 2011

DiSC Profile Methodology @

What does DiSC stand for?

Dominance
Person places emphasis on accomplishing results, the bottom line, confidence

Influence
Person places emphasis on influencing or persuading others, openness, relationships

Steadiness
Person places emphasis on cooperation, sincerity, dependability

Conscientiousness
Person places emphasis on quality and accuracy, expertise, competency

Behaviors
- Sees the big picture
- Can be blunt
- Accepts challenges
- Gets straight to the point

- Shows enthusiasm
- Is optimistic
- Likes to collaborate
- Dislikes being ignored

- Doesn't like to be rushed
- Calm manner & approach
- Supportive actions
- Humility

- Enjoys independence
- Objective reasoning
- Wants the details
- Fears being wrong
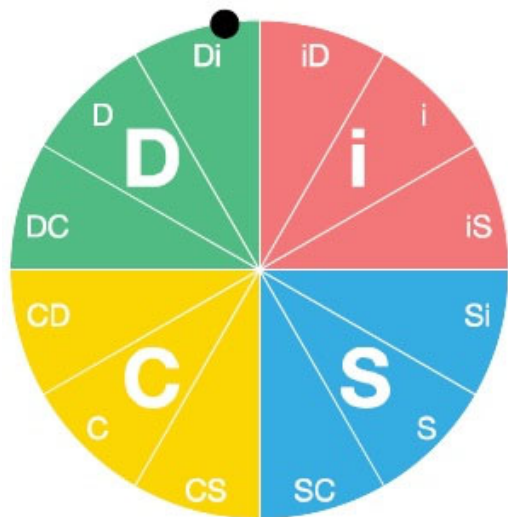
18

© 2011

My Profile

Dominance - *places emphasis on accomplishing results*
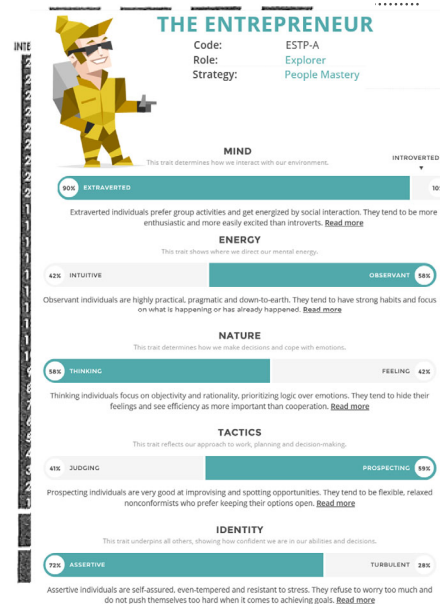**Influence -** *Person places emphasis on influencing or persuading others*
Steadiness - *Person places emphasis on cooperation*
Conscientiousness - *Person places emphasis on quality and accuracy*

THE ENTREPRENEUR
Code: ESTP-A
Role: Explorer
Strategy: People Mastery

MIND
This trait determines how we interact with our environment.
90% EXTRAVERTED   INTROVERTED 10%
Extraverted individuals prefer group activities and get energized by social interaction. They tend to be more enthusiastic and more easily excited than introverts. Read more

ENERGY
This trait shows where we direct our mental energy.
42% INTUITIVE   OBSERVANT 58%
Observant individuals are highly practical, pragmatic and down-to-earth. They tend to have strong habits and focus on what is happening or has already happened. Read more

NATURE
This trait determines how we make decisions and cope with emotions.
58% THINKING   FEELING 42%
Thinking individuals focus on objectivity and rationality, prioritizing logic over emotions. They tend to hide their feelings and see efficiency as more important than cooperation. Read more

TACTICS
This trait reflects our approach to work, planning and decision-making.
41% JUDGING   PROSPECTING 59%
Prospecting individuals are very good at improvising and spotting opportunities. They tend to be flexible, relaxed nonconformists who prefer keeping their options open. Read more

IDENTITY
This trait underpins all others, showing how confident we are in our abilities and decisions.
72% ASSERTIVE   TURBULENT 28%
Assertive individuals are self-assured, even-tempered and resistant to stress. They refuse to worry too much and do not push themselves too hard when it comes to achieving goals. Read more

19

Profiling in Action

JOEPERZEL
Speaker | Presenter | Workshop Leader

20

© 2011

Typical Communication Skills

- Verbal and Written
- Reports
  - ✓ Status
  - ✓ Summary
  - ✓ Charts and Graphs
- Group meetings
  - ✓ Brainstorming
  - ✓ Status
  - ✓ Working
- Formal and Informal
- Drive-bys

Excellent Communications

- The Art of Listening
  - ✓ Ears & Mouth
  - ✓ Ask a question…..then remember to be quiet
  - ✓ Don't finish the other person's sentences
  - ✓ Tone of voice
  - ✓ Step back and listen to all the information – don't focus on 1 piece

TALK IS CHEAP BECAUSE SUPPLY EXCEEDS DEMAND.

Hint
- Body Language speaks volumes
  - ✓ A picture does tell a 1000 words
  - ✓ Remember to check your audience
- What are some ways you can tell someone is engaged/not engaged?
  - ✓ What are some tricks to use when someone is not engaged?

Excellent Communications

- Always think "who am I talking to?"
  - ✓ Management/Sales/Marketing – Quick and to the point
  - ✓ Technical/ Engineering/Security – Details
  - ✓ HR/Operations – Process and Procedure
  - ✓ Accounting/Finance – Details + Process and Procedure

www.clipartof.com · 1162777

Excellent Communications

When you talk, you are only repeating what you already know. But if you listen, you may learn something new.

rashikajain.com

Being a Chameleon

Joe's Definition of a Project Chameleon:

- Adapting to a situation to get the optimum result by using the best communication styles and motivators at your disposal to influence each person and/or group based upon their reality

I call it "Playing to Win"

© 2011

What is the setting-Individual

- Individual setting
  - ✓ Able to have a more candid conversation
  - ✓ People are less likely to posture like they might in front of a group
  - ✓ You can focus a particular style of communication to just the 1 person

© 2011

What is the setting - Groups

- Group setting
  - ✓ Let the group know the type of meeting
    - o Brainstorming – a collaboration
    - o Interactive – Status reporting with Q&A
    - o Information sharing – they are to listen and learn
  - ✓ A great way to apply group or peer pressure
  - ✓ A great way to utilize others to communicate or make your point
  - ✓ Set time parameters

Hint:

➢ If you need to communicate in 1 style (i.e. detailed) make sure to warn the others, (i.e. less detail-orientated) what you are doing

© 2011

Handling "Issues"

- Key Elements
  - ✓ Are they open to receiving feedback
  - ✓ Do you know the best way to "share" your feedback
  - ✓ Where are each of you in the organization chart
  - ✓ What situation are you in when the opportunity presents itself
  - ✓ What relationship have you previously built with them

© 2011

Stakeholder Management
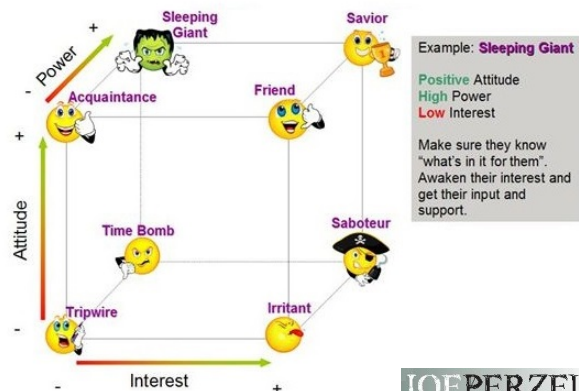

Know who can impact your project

- Who they are
- What role will they play with respect to your project
- What influence do you have with each
  - ✓ What relationship and trust level have you built
  - ✓ What currency have you built-up
- Where they are on the Stakeholder identification chart

The Axis   @

- Think of each stakeholder in terms of:
  - ✓ Attitude (Backer/Blocker)
  - ✓ Power or ability to influence (Influential/Insignificant)
  - ✓ Interest (Active/Passive)

Stakeholder identification – "spheres" of influence

Example: **Sleeping Giant**

Positive Attitude
High Power
Low Interest

Make sure they know "what's in it for them". Awaken their interest and get their input and support.

Stakeholder Analysis Plan

The Steps in Stakeholder Analysis

- Plan
- Identify
- Determine
- Rate
- Use

Strive for excellence, not perfection.
H. Jackson Brown Jr.

- Know where stakeholders are on the chart coupled + understanding their personality profile = knowing how to deal with each

- Then utilize: "Influence", "Involve", "Ignore", "Isolate" I^4

How to improve your Sphere of Influence

Authority:

- A power or right delegated or given

- The power to determine, adjudicate, or otherwise settle issues or disputes; jurisdiction; the right to control, command, or determine

- The **right** to exercise power given by another

vs. Power:

- The possession of control or command over others; authority; ascendancy

- The ability or **might** to influence people or events

33

Trust and Rapport   @

- Build Trust and rapport with someone or any group when you get the chance, even if they aren't in your project's sphere of influence – yet
  - ✓ With your Sponsor and every Executive you can connect with
  - ✓ With lead SMEs
  - ✓ With any and every gatekeeper

You cannot build a reputation on what you are going to do…"
- ➢ Henry Ford

Stakeholder identification – "spheres" of influence
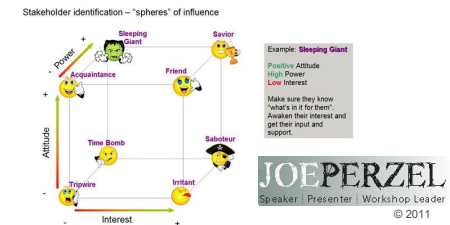
34

Building a Relationship = Trust

- Ask questions – and listen
- Communicate effectively
- Make them look good
- Deliver on what you promise
- Start early – before you need it
- Focus on the key Stakeholders first

- ➢ Note:
  - ✓ Remember people behind the scenes
  - ✓ Remember to talk "their" language
  - ✓ Who goes into the office 4+ days/week?

35

The Situational Project Leader

Influence and Politics

36

Influence and Politics

Definition of Reality

Reality:
- The state of things as they <u>actually exist</u>, rather than as they may appear or might be imagined

Joe's Definition:
- The state of things that <u>each individual</u> believes actually exist

- Some Reasons why there might be alternate realities….
  - ✓ Different sets of information known/experiences by different people or groups
  - ✓ Different personality types
  - ✓ Different goals/desires
 - ✓ Different communication and/or learning styles

---

Different Realities

- It is everywhere: every organization, department and project
- Different at each organization, even within different departments and project
- Different view from where other person/group sits, or a different perception of what they see …

Different Realities

DO YOU THINK IT KEEPS GOING ABOVE THE SURFACE?
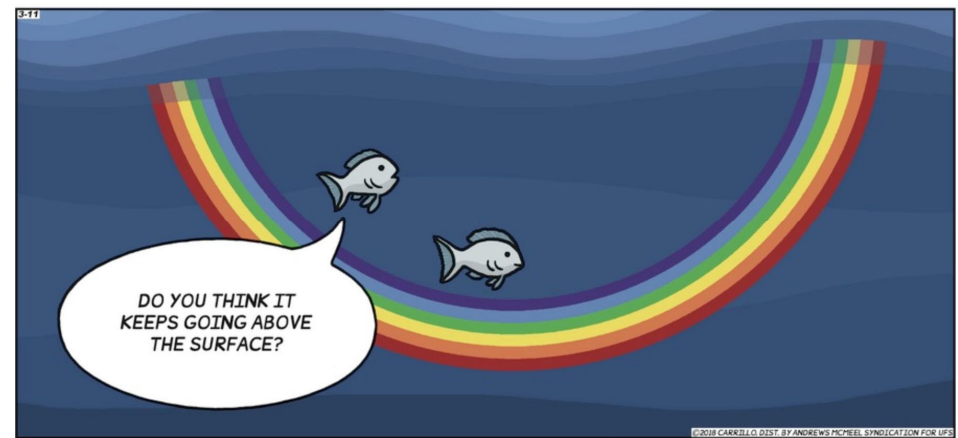
- Different view from where you "sit"

Assuring a Good Outcome

- When is it important
  - ✓ Soliciting a big decision
  - ✓ Must have a tough conversation
  - ✓ Creating important documents like proposals or strategic plans
  - ✓ It is leaving your personal control i.e. RFPs
- Why
  - ✓ Find the objections and issues before someone publicly declares their opinion
  - ✓ Find your supporters and detractors
  - ✓ Have better influence over the outcome
- How to handle
  - ✓ Plan on multiple cycles - back and forth
  - ✓ Ask others that have gone before you
  - ✓ Review with a "safe" audience/cube mate
  - ✓ Refer to it being a "draft"
  - ✓ Put it in a "drawer"

© 2011

Managing Outcomes - Hints

➢ Make assumptions based on what you know about :
  - ✓ Their role in the company, project, process …
  - ✓ The Department, Division, Group the work in/for
  - ✓ Their communication style
  - ✓ Their tenure with the company
  - ✓ Whether or not they make eye-contact
  - ✓ Their background: age, gender, where they live
  - ✓ ….
➢ Then be ready to change your position as you really get to know someone

© 2011

Managing Outcomes through Influence

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

➢Maya Angelou

© 2011

The Situational Project Leader

Sales and Negotiations

© 2011

I presume –

Most people hate doing "sales"

- Not really sure what it means and/or how to do it
- Feel they have a long way to go to be "good enough"
- Don't want to be "that guy" – think all sales = *Used Car Salesman*

Everyone is in sales

- ….and have been "selling" their whole lives

Requirement to be successful

45

© 2011

Basically, Sales is all about…

- Provide a benefit to a "buyer"
- Deliver on your promises
- A personal connection – rapport, trust and respect and a willingness to barter
- Listen to what they say they are looking to accomplish or what will make them happy
- Negotiations

Hint

➢ If you hate Sales, but recognize it is required, what do you do…..
  ✓ Think of it as helping a Sponsor, team member, partner, etc. make a good decision

46

© 2011

Sales – The QNC "Cycle"   @

- Know how to **qualify** the deal   Learn/Understand: Ask/Validate
  - ✓ Get them engaged
  - ✓ Know enough to close the deal
  - ✓ Know who your buyer(s) are
  - ✓ Find out who is the decision maker
  - ✓ Understand their "buying cycle"

- **Negotiate** as needed   Influence
  - ✓ Benefits
  - ✓ Delivery
  - ✓ Engagement/help
  - ✓ Price

- Go for the **close**   Wrap-up and Document
  - ✓ Ask for the "business" (the decision)

47

© 2011

Negotiations

© 2011

Negotiations Is:

- A communication **process** between two or more parties; in which both sides consider alternatives to arrive at a **mutually agreeable** solution.
  - ✓ Forging an Agreement or Creating a Partnership
  - ✓ An act of cooperation – NOT confrontation
  - ✓ A "Win-Win" Relationship
- Great Negotiators:
  - ✓ Have Patience
  - ✓ Understand People
  - ✓ Exude Confidence
  - ✓ Are Open-Minded
  - ✓ Remain Calm
  - ✓ Seek Options – Collaborate
  - ✓ Know <u>Minimum</u> <u>Acceptable</u> Position

The BIGGEST Source of Mistakes

- Misinterpreting the other party
- Being unable to verify what was said
- Misunderstanding a question
- Making improper assumptions
- Being unable to respond appropriately
- Confusing the situation
- Slowing or halting the progress of negotiations
- Selecting the wrong strategies or tactics

Note
➢ These mistakes most often come from the **failure to listen**

Gaining Agreement – Techniques & Tools

- Brainstorming
- Find common ground
- Use an agent or 3rd party
- Buy time to think
- Make proposals that are easy to agree
- Find ways to "save face" for the other side
- Work on developing partnerships

Joe's Negotiating Rules to Live By

- Pre-close from the start using clarifying questions
- Remember to be quiet after asking a question
- Be prepared
- Email, texts, IM are not for negotiating
- Ye who goes first probably loses
- If you're not willing to walk away – you have already "bought"
- Watch, listen and learn – the first one to get an edge probably wins
- You need 1 more reason for the other person to say Yes than they have reasons for saying No

The Situational Project Leader

Typical Tendencies

53

© 2011

Organizational Tendencies

- Project innovation is about driving and directing the 20% who embrace change and disruption to deliver results

- Organizational Change Management is about helping the other 80% adapt and accept

54

© 2011

Management's Tendencies

- Require facts and figures that go beyond the initial presentation of the proposed project - will ask for updates & status reports to stay current
- Place a great degree of concern about the project's impact on their reputation
- Interests include the problems and drawbacks to be encountered as well as how the issues will be handled (i.e. Risk Management)
    - ✓ Financials
    - ✓ Resources
    - ✓ Scope, timeframe and costs (i.e. triple constraints)
- Different facets of operations are under their command responsibility
- Has the capability to convince the executives and shareholders to buy-in

Note:
- ➢ Not every manager will have the same degree of enthusiasm
- ➢ What should their attitude be?

55

© 2011

The Team's Tendencies

- To be part of the 20% who like the changes that comes from a project
- To start out excited, but wain in the middle of a bigger project
- Some of their concerns may include:
    - ✓ Methodologies or time frame of the project are inadequate or too short
    - ✓ Confidence in Executive Management's decisions

Note:
- ➢ The quality of the work they perform will impact the outcome of the project
- ➢ Their cooperation and ability to work as a team is crucial
- ➢ There should be an organized effort to sustain the team's continued support
- ➢ Not everyone on the team will have the same degree of enthusiasm
- ➢ What should their attitude be?

56

© 2011

The Customers' Tendencies

- To not know "exactly" what they need or want (but they tend to know what they don't want)
- To want a good value – but rarely think about the Triple Constraints
- To react according to the track record of the project team and management – either positively or negatively
- To have a wait-and-see attitude towards new teams and management
- Often part of the 80% who don't like the changes from a project
- Some of their concerns may include:
  - ✓ Understanding of the problem they are solving
  - ✓ Confidence in the Team and Executive Management's decisions

Note:
  - ➢ The degree of customer satisfaction and support will be the true measure of the project's success
  - ➢ Could be external or internal relationship
  - ➢ There should be an organized effort to sustain their on-going support
  - ➢ What should their attitude be?

© 2011

"Big Brother" Tendencies

- To require transparency for compliance-checking
- To be conservative and careful – risk avoidance
- To have a predefined set of rules to follow and therefore are predictable
- Often part of the 80% who don't like the changes from a project
- Some of their concerns may include:
  - ✓ Exceptions to the rules
  - ✓ Changes
  - ✓ Surprises

Note:
  - ➢ Can be internal or external
  - ➢ There should be an organized effort to prepare for their support approval
  - ➢ They are often the "final" approval for go-live
  - ➢ What should their attitude be?

© 2011

Shareholder & Executive's Tendencies

- To be presented with well-prepared facts from proven techniques – on only 1 slide please
- To know there were multiped options considered
- To understand the justification of why the plan being presented is the best choice to meet their interests
- To not know "exactly" what they need or want, or be able to communicate it effectively
- Some common concerns may include:
  - ✓ A lack of clarity about the project's benefits – not knowing what's in it for them
  - ✓ Not having a genuine interest in the proposed undertaking
 - ✓ Confidence in Management and/or the Team

Note:
  - ➢ They furnish the main bulk of the project's financial requirements
  - ➢ There should be an organized effort to sustain their on-going support
  - ➢ What should their attitude be?

© 2011

Tendency Hints

- Remember that no 2 people or groups are a like
  - ✓ Be careful of a bias

- People change in different situations
  - ✓ Under stress vs. relaxed
  - ✓ Groups vs. 1-1
  - ✓ Formal vs. informal settings
  - ✓ They are driving the change or having it thrust upon them

© 2011

SUMMARY

In my humble but accurate opinion...
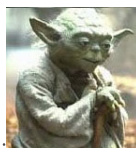
- Leadership is 9,9
- Confirm and Validate – everything that impacts the project
- Not everyone thinks and acts the same: be empathetic, flexible, creative
- Evaluate and manage your Stakeholders
- Power = Right + Might
- Practice managing outcomes through influence using your people "tools": listening, motivating, trust & rapport, bartering, communication
- Sales and Negotiations are part of the Leadership Role
- If you only learn a few things today…..
  - ✓ Help them own the idea, otherwise remind them what's in it for them
  - ✓ Be a Chameleon: adapt your style to the other party or group
  - ✓ (I4) = Influence, Involve, Ignore, Isolate

JOE PERZEL
Speaker | Presenter | Workshop Leader
© 2011

61

REUTERS/Pawel Kopczynski

Questions, Evaluations & 1 Lesson Learned

IIBA Albany Capital District

JOE PERZEL
Speaker | Presenter | Workshop Leader
© 2011

62

Email Joe to offer **feedback** or request a full copy of **any presentation**

The Dark Arts of Project Management Series
- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- ✓ The Situational Project Leader: Managing Up, Down and All Around
- ✓ Leading Strategic Initiatives: Managing Innovation Through Culture Change
- ✓ There are no Politics in Business
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ Yes, And… Advanced Negotiations in a Project World
- ✓ Everyone is in Sales: Successful Tools & Techniques for Project Leaders
- ✓ Selling the Value of the PMO and Project Management
- ✓ A "Surefire" way to Ensure Schedule Performance!
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World
- ✓ Joeisms: Leadership Concepts and Other Sage Words of Advice

Project Management Essentials
- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Q&A: Improve Project Success Through Better Listening
- ✓ Using MS Project – the minimum you need to know to thrive
- ✓ Building your Essential PM Soft skills

Professional Association
- ✓ Strategic Planning for Organizational Success
- ✓ The Basics of Sales and Selling: Everyone's Job
- ✓ Setting Up a Sponsorship Program
- ✓ Best Practices in Volunteer Recruitment and Engagement
- ✓ Successful Career Networking Groups: an Easy Key to Chapter Growth
- ✓ Pulling-off a Great PDD or Chapter Meeting Program: Organizing, Attracting and Marketing

joe@jperzelinc.com - 612.801.0737
https://www.linkedin.com/in/jperzel

JOE PERZEL
Speaker | Presenter | Workshop Leader
© 2011

Situational Leadership

Addendum

JOE PERZEL
Speaker | Presenter | Workshop Leader
© 2011

64

Definitions

- **Joe's Definitions of the Multiple Types of Project Managers:**
  - ✓ Project Coordinator: great at mechanics of the project
  - ✓ Technical Project Lead: focuses on managing the technical team
  - ✓ Application Project Manager: handles projects under $500k and 10 people
  - ✓ Enterprise Project Manager: handles projects over $1M and 20 people

There are a lot of people with a PM title or responsibility in this world – it is one of most difficult jobs to consistently articulate

© 2011

Assumptions

- Why they can be your Foe
  - ✓ A lot of times we don't even know they exist
  - ✓ Unfounded they are a Risk that can turn into an Issue
  - ✓ Not managing them hinders a project leader's ability to control their project

- Why they are your Friend
  - ✓ Properly documented and shared they can be a great communication technique
  - ✓ They are an important way to validate key parts of your project scope, goals and success criteria
  - ✓ If documented they help you defend your charter, project plans/sprint planning, etc. later when someone challenges them

  ➢ What do Assumptions become when they are transparent and agreed to?

© 2011

What it Takes to be a Good Leader

Exercise
- List attributes you associate with a successful leader and why?
- Think of a leader you admire – do you associate any additional attributes with them?

© 2011

What it Takes to be a Good Leader

- Good Communicator – at all levels of an organization
- Adapts to different personality styles
- Driven toward goals, yet can flex when needed
- Can foresee the future
- Thick-skinned
- Good Leader
- Good Listener

  How many of these are "mechanics"? @

- Well-networked – internally and externally
- Knows how to apply "just enough Process & Tools"
- Understands the Business/Application (enough)
- Organized (enough)
- Disciplined (enough)

Talent Triangle: Technical Project Management, Leadership, Strategic and Business Management

© 2011
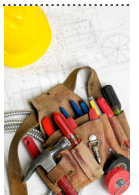
Asking a Question

- Building rapport questions

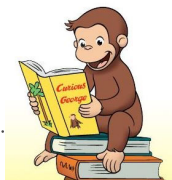 - ✓ How was your weekend/doing anything fun this weekend?
  - ✓ How is the family?
  - ✓ I see you like … biking, sailing, baseball, Crown Royal, Dilbert, plants……

  - ✓ Wasn't that a tough meeting to sit through?
  - ✓ Boy, you did a great job explaining that complicated topic – how did you do it?

69

© 2011

Asking a Question

- Gathering information questions

  - ✓ I haven't seen you around before, are you new to the company or department?
  - ✓ What do you do?
  - ✓ What company/department were you at before your present job?
  - ✓ Do you have any contact with this project?

  - ✓ How do you see the project going so far?
  - ✓ Do you have any thoughts on the project assumptions we just reviewed?
  - ✓ How would you address the risks we just discussed?

70

© 2011

Asking a Question

- Leading the discussion questions

  1. How do you see the project going so far?
  2. Do you have any thoughts on the project assumptions we just reviewed?
  3. How would you address the risks the assumptions generated?
  4. If we did … to mitigate the risks would you help me talk to the sponsor to get their buy-in?

  1. Do you think the milestones are achievable?
  2. Where do you see the biggest challenge to meeting the milestones?
  3. How would you handle the challenges?
  4. If I did … would you support it?

71

© 2011
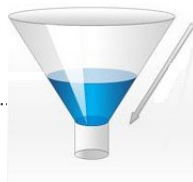
The Spheres

- **Sleeping Giant**
  - ✓ Powerful, low interest, positive attitude
  - ✓ alt: influential, passive, backer
  - ✓ A source of tremendous support for the project since they have the power and attitude to help
  - ✓ Make sure they know what's in it for them
  - ✓ Engaged them early and often in order to awaken them to the benefit of the project

- **Savior**
  - ✓ Powerful, high interest, positive attitude
  - ✓ alt: influential, active, backer
  - ✓ Should be easy to work with because of attitude
  - ✓ Do whatever is necessary to keep them on your side – pay attention and cater to their needs

72

© 2011

The Spheres

- **Time Bomb**
  - ✓ Powerful, low interest, negative attitude
  - ✓ alt: influential, passive, blocker
  - ✓ They need to be understood so you can "defuse them before the bomb goes off"
- **Saboteur**
  - ✓ Powerful, high interest, negative attitude
  - ✓ alt: influential, active, blocker
  - ✓ They need to be engaged and converted in order to not get in the way
  - ✓ You should be prepared to "clean-up after them" if not able to convert

Note:
- ➢ These stakeholders are a priority for including in a risk mitigation plan

"A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."
Sir Winston Churchill

© 2011

The Spheres

- **Irritant**
  - ✓ Low power, high interest, negative attitude
  - ✓ alt: insignificant, active, blocker
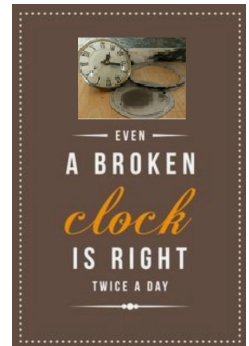 - ✓ They need to be engaged so that they stop "eating away" or be "put back in their box"

- **Friend**
  - ✓ Low power, high interest, positive attitude
  - ✓ alt: insignificant, active, backer
  - ✓ They should be used as a confidant or sounding board

Note:
- ➢ If time allows – attend to after the other priorities

EVEN
A BROKEN
clock
IS RIGHT
TWICE A DAY

© 2011

The Spheres

- **Trip Wire**
  - ✓ low power, low interest, negative attitude
  - ✓ alt: insignificant, passive, blocker
  - ✓ They need to be understood so you can 'watch your step' and avoid 'tripping up'

- **Acquaintance**
  - ✓ low power, low interest, positive attitude
  - ✓ Alt: insignificant, passive, backer
  - ✓ They need to be kept informed and communicated with on a 'FYI only' basis

Note:
- ➢ Low and Low – does it matter what their attitude is?

© 2011

Impact Analysis Worksheet

Name	Organization	Role	Power	Interest	Attitude	Risks/Unique Facts/Expectations	Ways to Manage	Label

© 2011

Few folks play "fair"

Give yourself permission to "play" as well

- Recognize it is part of your duties and embrace it
- Know the rules/guideline – the fences you need to stay within
  - ✓ "Bend" them when appropriate
  - ✓ Make sure the risk = reward
- Manage Communications: deliver the right message at the right time, to the right audience
  - ✓ Information is power: you don't have to tell everyone, everything, right away

"Don't ever take down a fence until you know why it was put up."
➢ Robert Frost

Few folks play "fair"

- Don't be afraid to ask for:
  - ✓ The unusual
  - ✓ Something that would normally be a "no"

- Sell it
  - ✓ You can't get a "yes" if you don't ask
  - ✓ It is all in how you ask
  - ✓ Be willing to take "no"
  - ✓ Don't sell past the "yes"
  - ✓ Think of it as partnering by leading others to a good outcome

---

Sales is all about…

Buy-in Teaching Asking Talking Persuading Coaching Helping Conversing Differentiating Networking Credibility Objections Acknowledging Influencing Mentoring Educating Presence

www.toddcohen.com
todd@toddcohen.com

© 2011

The **Silent** Tool of Selling, Influence and Impression

"Presence"