

Above and Beyond: The Secrets of Outstanding Project Leadership¹

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What is the secret for delivering wildly amazing project management leadership? The first step towards transformation is for the project manager to develop situational awareness. From the strategic vision of the company down to the smallest project, understanding the context of a project in the bigger landscape of a company's business is only part of situational awareness and a skill that enables project managers to set themselves apart in a very competitive playing field. Understanding this will enable you to never overlook an opportunity to add value.

As part of this understanding of your company's vision, you must also have a vision for your team and yourself and how you fit in the value proposition. This is a concept referred to as "becoming a 360-degree thinker". This is when we look at our company's history to understand where we've been to then understand how we best chart our course to arrive at where we're heading. Becoming a 360-degree thinker means the leader will seek first to:

- Understand the vision-know the vision of your company for the next 1-5 years and understand your role in making that vision reality.
- Know the business trends-keep up with the latest trends in business...for example, a trend lately is for businesses to enlist "cloud" support for email or other software needs.
- Active learning-be sure you are looking to constantly improve or grow your skills such as getting a Lean Six Sigma certification or an ITIL credential. And how best to apply these skills to add value to your company's overall bottom line.
- Build the team and communicate the vision-whether the team is granted or you must recruit and build the team, make sure you are including them in the vision for the organization and that they understand their role.
- Proactively analyze the processes-don't wait for something to break; measure the effectiveness of your processes and always consider how you might make things easier and more efficient for the team and your company.

Once you understand the concept of becoming a "360-degree thinker", we can move the conversation into applying these skills to attaining success as a modern leader and here we explore several concepts from our book about how to perform as a

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leader in today's business environment. We detail our 3-step process starts with understanding and planning a journey of personal improvement. Sun Tzu records in "The Art of War": "Thus it is said, one who knows his enemy and knows himself, will not be endangered in a hundred engagements." We believe that this is the initial concept of situational awareness taken to the next level so that you can:

- Understand the competition as well as yourself and trends in the field—you MUST be better than most project leaders in all you do!
- Learn and understand the goals of your co-workers, superiors, and team members as well as yourself; the platinum rule, "Do unto others as they want done!"
- Try to always look for ways you can add value: wearing many hats, never letting ego get in the way, vendor/product pricing negotiations, and many more examples.

Other concepts that distinguish the "Above and Beyond" project manager from the crowd is a leader who builds the "esprit de corps" within their teams:

- Use ingenuity and innovation to anticipate and plan for the future: host brown-bag lunch seminars or virtual webinars where you use a white board and call on people one by one to give their ideas about a particular challenge.
- If the team is geographically and time zone separated, use creative tools to collaborate—there are many that are free and easy to use (Google sites, Facebook, LinkedIn, Salesforce has Chatter, SharePoint has blogs, and Workday has a way to post messages as well). A few clever "cloud" tools can help bring you closer as a team, even when members are a world away.
- Keep a visual representation of the highest priority tasks: the current week's tasks, assignments, goals and make visible to everyone; if you are virtual, find a way to do that "in the cloud" so everyone knows where you are and where you are going from day to day, no matter where they are in the world.
- Talk by phone, chat via instant messenger (IM), lead video calls on Skype, make videos for team members that can't attend critical demos or interact in some way with the team daily; the dialogue will build relationships and encourage the escalation of problems early, based on trust, while you still have time to act and correct.

Part of what it takes to be "Above and Beyond" is to lead from wherever you are in the organization. By this we mean that leaders can make a conscious choice to become a leader wherever they might fall in the organizational chart.

"There are no small parts, just small actors..."

- Every role is important, especially in the current economy so make the decision to lead up, lead your peers (lead across), and lead your team.

- Give thought to your ethics, integrity, morals...keeping high standards and never compromising will make you stand out from the crowd—it's a mind-set.
- “Lead, follow, or get out of the way...”—participation in events such as learning events and educational sessions means that the participants have great potential as leaders and therefore, are bound to navigate a journey of continuous improvement based on their calling.
- PMs can always seek out ways to affect their companies no matter where they are in their careers or in the organizational chart.
- Trust is essential to effective modern leadership: building trust with teams, executives, bosses, suppliers, and customers. Doing what you say and saying what you are doing lends to leadership by example.
- Transparency is the new motto: sharing all project documentation, even the ugly, is the new credo in our business. Something quick and useful is better than perfect and forever from now. If you aren't prepared for the information to possibly appear on the Wall Street Journal, you better figure out why and make changes.
- Whether folks are half-way across the room or across the world, you have to figure out how to connect with them at a human level to make your working relationship successful. No amount of tools can overcome that fact.
- Understanding the communications model of your team is necessary to build trust: how often you expect to communicate with team members, vendors, customers, stakeholders, and everyone in between—define this early and make sure everyone involved understands and agrees with the model.

Also, it is critical in the modern era that the “Above and Beyond” PM learns the secrets to be inclusive, regardless of the time zone, continent or locale of members of the team. This will involve a manager who will:

Embrace the diversity of the new global working environment:

- Get educated on the different groups involved in your work and understand their time zones, culture (high context/low context societies), language, seasons, holidays, etc.
- Understand the value of different perspectives when focusing on a situation and welcome new ideas that may not have been possible to generate from your paradigm.

- Keep various lines of communication open so the team understands that you really do have an “open door” policy even separated by continents and 13 hours of time zone. And make sure they all know that you don’t shoot the messenger when the news is bad news.

Finally, it will be critically important that an A&B leader acknowledge and praise the work of their team. In order to do this successfully:

- Leaders must remember to celebrate successes and give praise for specific achievements by the team in the moment so timely praise and acknowledgement, and
- Understand that people need to feel they’re valued, especially when working remotely from the physical locale of the company so make sure to:
 - Speaking, IM’ing, video tele-conferencing at least once a week or daily will help you lead in these situations more effectively,
 - Make it popular to achieve; be creative about how you give praise: for example, this past year, my work with Appirio and how they use Demo Jams to reward clever problem solving or the CloudSpokes effort on Facebook to encourage collaboration, and
 - Have 1-2-1 lunches or grab coffee with your team members whenever possible.

Another useful secret is to develop highly optimized teams. Experts from Harvard who researched the necessary ingredients for forming a highly optimized team agreed that there are five enabling conditions for efficient teams:

- Team has to feel like a team –Tuckman’s stages of forming, storming, norming, and performing.
- Team must have a clear purpose—define with a project charter, so that the scope is well understood, even if this is not a normal process within your company, so that the team can understand their mission.
- Be organized in a way that can achieve the overarching purpose and or goals that have been set through the project charter.
- Operate within a supportive context—make sure that when your team needs support through late night working sessions such as meals brought in or getting supplies that encourage progress, that you are the A&B PM who provides that support.
- Make sure that you act as a coach and give guidance where needed but allow for the natural leaders of the team to emerge whether they be leaders in project management or technical leaders in your industry.

The obstacles to getting teams to a “highly performing” state are:

- Acting in a rigid role hierarchy—Coaching and understanding the concept of teams becoming self-organizing.
- Being tactical in focus and not strategic—teams not understanding the “big picture” of the company and not understanding or not agreeing with their role in that future.
- Not providing enough communication—leadership does not have enough timely & effective communication with employees or teams about what they are asked to do and why it is critical to success.
- Leaders who are not providing individually focused coaching of team members—leaders should keep real development plans in mind for members in order to encourage high optimization and high morale.

To summarize what it takes to develop “highly optimized teams”, remember these concepts:

- Project team needs to be at the “performing stage” of Bruce W. Tuckman’s stages of group development.
- PM needs to communicate the team’s purpose clearly and concisely.
- Team needs to focus on self-organization and capitalizing on each other’s highly developed competencies (over-developed strengths) to achieve the overarching purpose and goals that have been set.
- PM will make sure that the environment provided for the team, whether virtual or in person, is supportive, collaborative and encouraging.
- Coaching is an important factor of the “highly optimized team” and the PM needs to make sure that each individual team member has access to coaching and the tools they need to make the project successful and personally satisfying.

The next secret we explore is the area of successful virtual team management concepts. In order to be the best at virtual team management, we recommend a better understanding of the spectrum of expertise in this area with one extreme being an open leadership style and the other end of the spectrum is the self-organizing team:

- The success of the project will depend on how effectively and cohesively the team is led and managed, regardless of their location, time zone, or language.

Let us explore a style that lies between the open leadership style of management and the self-organizing team concept.

Open Leadership style is explored through the book “Open Leadership, How Social Technology Can Transform the Way You Lead” by Charlene Li which proposes:

- Changes in how we work and communicate require giving up control completely, communicating openly with transparency and authenticity.
- New rules that we are bound by in today’s workplace, created by a new culture, which thrives in a world where openness is the new standard.

Then we wrap up our exploration of different effective virtual team management styles with: “The Leader’s Guide to Radical Management, Reinventing the Workplace for the 21st Century” by Stephen Denning who proposes:

- “...the possibility of self-organizing, that is, the autonomy to decide how to organize itself and how to solve the problem.”
- We have to assess culture, language, personality style quickly and be more innovative with the leadership style that we apply to virtual teams.

After we’ve covered these concepts, we begin to explore how to lead teams and even organizations through effective change. We talk about the different kinds of changes that PMs are faced with in the modern work environment and offer case studies on how to be “Above and Beyond” effective at leading teams through changes. There are two different kinds of changes we will explore:

- Involuntary—change is forced upon us and examples discussed:
 - Market share is being lost and you must react fast to remain competitive.
 - Lost employees within the first 2 years of service and the need to understand how to retain the “corporate knowledge” that is leaving.
- Voluntary—changes we choose to make to remain effective are discussed:
 - Take on the marketing and sales of a new product line.
 - Shut down a project as complete or because it is losing money (Earned Value Management System (EVMS) data might be showing that it’s time to kill an effort due to profit loss).
 - Decision is made to outsource a portion of the business (software development, email server hosting, security, or document shredding services) to save money.

How do we effectively introduce the concept of seeing and presenting changes to give new perspective to their teams and fellow employees? Some ideas that we discuss are:

- Change creates challenges and opportunities for us!

- Recognizing change to help us grow:
 - Look at data, metrics, and lessons learned to anticipate the need for change.
- Anticipate needed changes to help plan how to react and communicate to teams.
- Know how to deal with change to give us more credibility with teams.
- Understanding how to manage change can ease the journey for our employees.
- Leaders must have done their homework on the change which lends to credibility.

Understanding the path to successful change helps participants visualize the way to make it happen in their work environments. We offer these ideas to “lead through the change”:

- Success comes from influencing the team to embrace change and enable you to lead the organization through change.
- Discuss concepts of practical experiences about managing teams and being a positive leader in any organization through various kinds of changes.
- Examine strategies and key elements identified for assured success when faced with change

Finally, we tie it all together by summarizing the methods for leading successful change projects by

- Overcoming resistance to change by talking about the real reasons behind the change, the expectations for betterment of the company, the product or service, and the team member’s role in the success of that change.
- Before you can ask people to change, you have to have a solid relationship with your team. You must have their trust so in this moment, before you have to ask for more of others, you must know that your trust and credibility is strong with your team:
 - Ask yourself, “What is my relationship with my co-workers?” before you have to ask much of your team by making significant changes. (You can get information from surveys, 360-degree feedback processes, and “Lessons Learned” sessions after projects complete.)

- Understand what your “Leadership Maturity Level” or style is—that could be evidence driven, passion driven, relationship driven, or a blend of all of these?
- Consider 360 Reviews, annual reviews, customer feedback.
- Be prepared to make personal changes before asking others to change.
- Know what happened in the past before making changes for the future.
- Show others how change will benefit them or make their work-life better in some way.
- Give others ownership of helping to form the change or implement the change:
 - Create small pockets of people who really understand and embrace the change and create evangelists!

The A&B PM also knows the various Project Management Office success tips since many companies and organizations are starting to utilize this structure in their organizations. There are different kinds of PMOs a PM who is responsible for starting an internal PMO or involved in the team that is establishing the PMO for a company needs these criteria:

- Long-term commitment needed by the company,
- Business case with “opt out” plan defined,
- Understand the ROI; be able to measure, track, report,
- Plan to Plan the PMO; really decide the structure,
- Pick the PMO team, if you can or let them pick you, and
- Market the strategies and get buy-in for early adoption.

Understanding the different types of PMOs is critical as well so that a company can make an informed decision about how it wants to structure the PMO. There are different types of PMO structures:

- Center of Administration—Matrix management model where PMs don’t report directly to the PMO chief.
- Center of Excellence (CoE) –All PMs report directly to a PMO chief and use/promote a common set of tools, best practices, and collaborative data for managers in the company.
- Center of Governance—The core methodology of the company is housed here but PMs report to various business units throughout the organization.
- Combinations of these—where an organization might choose to have a CoE for PMs but the PMs actually report to BU managers.

We then discuss procedures to establish a PMO by exploring the different types and understanding the goals and mapping these structures to the longer term strategic plan for the role of the PMO in the organization. The steps we explore are:

- Plan and strategize about the role of the PMO in the organization.
- Structure the team (whether the PMs will be direct reports or a dotted line via matrix management model to the PMO).
- Foster a “Center of Excellence” attitude about your PMO’s role in your company, regardless of your PMO type.
- Understand how to scale existing resource tracking, reporting, risk management, and metrics (project, quality, cost, and delivery) processes via the PMO.
- Establish a “Success” database with case history information that will be useful to the “collective” moving forward.

We bring the presentation to a close with the final chapter on managing “cloud projects” and cover key concepts from our chapter called “Lasso the Clouds”:

- Need more than the PMBOK, more than just what you’ve relied on in the past—you have to stretch yourself and your knowledge
- Doing work consecutively is not an option anymore—you must figure out how to do concurrent work streams; understanding economies of scale
- Still need to plan, design, implement, and test as always but need very close interaction with your client as it is inevitable that neither party will consider every issue
- Your toolbox still applies: PMBOK, ISO, LSS, Agile, SCRUM, Waterfall, Spiral—all have points that are useful in the modern era but no one method is a silver bullet

What is all this talk about cloud projects and are they so different from the same problems project managers face any day with any project. We answer with a resounding “no” and give the following examples:

- Challenges with “cloud projects” don’t sound so different.
- Still have to get the customer committed to provide constant feedback.
- Understand the environment and all the systems impacted by changes.
- Optimistic estimations by technical team have an impact, as they always do.
- Suggest running demo’s in front of the customer to make sure you are getting it right.

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