



# Project Management Techniques

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ❑ Think critically when choosing a project team
- ❑ Make the best of an assigned project team
- ❑ Help teams move through various stages to become a high-functioning unit

## Project Management Techniques

### Choosing the Team

In some organizations, when you are assigned a project, your first task is to choose the members of your project team. Think carefully about who you choose!

To start, think about the areas that your project will involve. Will it be a marketing venture? An IT project? A hybrid of areas? Or will it be a brand-new venture that no one in your company has expertise in?

You will also want people with skills in a variety of areas, including planning, communicating, scheduling, and budgeting. You also want people who are, or who have the potential to be, high performers and good team workers.

Once you have identified the skills that you want, take a look at the people in your organization. Determine who matches your project's needs. You may even want to list your desired team members by role. (If you do this, make sure you include a second choice for the major roles.) If your project is in a particularly specialized area (especially if this area is new for your company), you may want to consider adding consultants or subject matter experts to your dream team list. Your choices should consider skills and personality.

Ask yourself:

- Can general experience be sufficient? Does the individual need specific experience?
- What interpersonal skills are required?
- How many of each of these skilled people will be needed?
- What level of supervision will be required for this role?
- Not everyone is a team player. Is this important?

Now that you've identified who you want, identify the possible obstacles to getting these people on your team and how to get around them. For example, you may want the star member of another department's team on your project. Perhaps if you speak to the head of that department and show them the value of your project they will be more willing to let that person work with you.

Once you have a plan in place, it's time to act!

## **Tips for Getting the People You Need**

In many situations, the people that you will want on your project will be on another team, under the direction of someone else. Although you may need this person on your project, chances are their supervisor needs them too. To get these people on your team (both figuratively and literally), you must act with grace and diplomacy. These interpersonal skills are a crucial component of being a project manager.

It is essential that you first go to the staff member's supervisor. Explain what the project is and how it will benefit the organization. You may also want to outline what skills you believe the staff member will gain while they are on the project and how it will benefit their usual role and team. You can also outline what benefit you will have to the staff member's supervisor; perhaps you can provide information for the employee's evaluation or provide some much-needed training.

Work with what their supervisor gives you. If the person you want on your team is only available during a certain time frame or for a certain percentage of the day or week, try to work with that. Or perhaps there is another staff member who has a similar skill set but is more available. Think outside the box to get the best solution for the employee, their manager, and your project.

Once you have the supervisor's buy-in, you will want to get the employee's buy-in, too. Phrase the new assignment as an exciting option for the employee. You may even want to involve their supervisor in the discussion.

"I've just been assigned an exciting project that involves re-designing the accounting package that our bookkeepers use. I know you had a lot of accounting experience before you joined IT, and I think you would find this project interesting. I've already discussed this with Karen, and she is willing to let you move over to this project for the next six months. Would you be willing to take on the task?"

Make sure you provide the employee with as much information as you can and let them know that you will share more information when it becomes available. (Later on today, we'll discuss meeting with team members once the team is formed.)

## **Making the Best of an Assigned Team**

In the ideal world, when you are tackling a project that involves more than just you, you would get to select the people with the right skills and the commitment to get the job done. However, in the real world, you won't always have the advantage of being able to choose every member of your

team. Sometimes people are selected because they are available, rather than because of their skill or talent.

In this situation, you will still want to make that wish list of skills, expertise, and personality traits that you are looking for. Then, compare this list with your team members. Who is the best fit for each role or task? Remember, you're looking for potential as well as actual skills and expertise.

If you find that you have a major gap between what you want and what you have, there are three options to consider. One option is training for the project members to make up for the skills that they lack. Another option is to bring in an outside consultant or subject matter expert. Or, you can simply proceed with what you have and hope that the gap is filled in with what the team learns as they go along. This last option is typically the only one that most project managers have. It can be very risky to expect people to learn new skills while executing an important project, but it can also be very rewarding for the team members.

### **Assigning Work**

Sometimes you are just handed a job that has to get done. The projects may be less a team effort and more an assignment to be completed by a certain deadline. Knowing how to give effective work assignments can be a powerful motivational tool that encourages employee creativity and commitment. Likewise, poorly assigned work can cause a project to come unglued.

#### **Who will do the task?**

Consider the training, experience and skill requirements and compare staff members against these needs. At the same time, include opportunities for employee development and growth.

#### **How will the task be done?**

Make sure the expected results are clear in your mind. Have a snapshot of success that you can share with employees. Putting your snapshot of success in writing often helps to clarify expectations in your own mind.

#### **How will the task be communicated?**

Before you give out the assignment, find a way to put the employee at ease. Help the employee understand the bigger picture.

Make sure you have allowed for adequate time to explain the assignment fully and why it is being done. Then, communicate the objectives and standards of performance expected. Remember, communication should be a two-way process. Allow time for questions and clarification, and get



## Four Issues to Address with Project Teams

There is no question that teams can unleash tremendous energy for a project. There are four issues that are critical to the success of that team:

- Accountability
- Experience
- Resources
- Empowerment

### Accountability

The biggest problem when forming teams and assigning projects to them is that accountability may be lost. Teams are often formed spontaneously by asking people to volunteer for assignments. They choose their own leader and then proceed with the work.

Ask yourself these questions: If the team fails miserably, or produces substandard work, would you fire the entire team? On the other hand, could you promote the entire team, as a team, if the work was outstanding?

In both cases, your answer is likely to be “No.” That means you do not have team accountability. You are hoping for a happy accident to occur.

The lesson: Team members must be chosen carefully and they must be very clear about their responsibility to the team.

### Experience

Teams also need a leader with more than technical expertise. Team leaders need to understand brainstorming, group dynamics, and the ability to get information from others.

### Resources

Resource allocation at the appropriate managerial level is another critical factor in forming and commissioning a team. Teams should not be formed from the bottom up and have to search and beg for resources or technical expertise. The appropriate manager should ensure that these resources are provided.

## **Empowerment**

Finally, teams formed to address strategic issues should not be formed at too low of a level. Hands-on workers can deal with operational concerns but they frequently do not have enough information to address strategic considerations.

## **Building a Winning Team**

### **Why is Teamwork Important?**

#### **Ingredients for Success**

One of the essential ingredients of a successful project is teamwork. Members of the group must understand that they are working toward a common goal. Therefore, assignments should be common knowledge to all participants. Each individual should understand their own area of responsibility and know who is responsible for other facets of the project. Unless this is clear from the outset, problems will occur, involving hurt egos and/or assignments that are neglected because nobody knew who was supposed to do what. (We'll discuss how to communicate expectations in a moment.)

#### **Maintaining Momentum**

On long-term projects, it can be difficult to hold the interest of all team members. How can you keep interest high and the momentum going?

- Frequent meetings
- Progress charts
- Some fun along with the project
- Recognition of work done

#### **Staying Positive**

Remember the self-fulfilling prophecy: if you believe they can do it, they can! Be realistic about your team's ability, but don't wear yourself and everyone else down with negative energy before the project starts. If your project team needs to learn new skills, it's your responsibility to organize training or coaching that will help them to succeed.

Before you decide that someone on your team is incompetent, give them a chance. People can often do more than you think they can. Perhaps they've just been waiting for a chance to prove their ability.

## Tips for Building a Winning Team

- Define roles. You give teams a fighting chance if everyone knows what his/her roles and responsibilities are from the outset.
- Make a list of all the skills needed to complete each task on your project.
- Do a skills inventory of the people you have, to see where you stand.
- Be prepared to negotiate for the team members you need. Don't just complain; come up with alternatives and solutions.
- Do the best you can with the people you have, but make sure resulting problems are documented as they occur.
- If your team doesn't have all the skills they need, build training into the project.
- If your team isn't qualified for some tasks and training would take too long, consider hiring a contract position for that particular skill/task.
- A diverse group of people may be difficult to work with initially, but over the long term they may prove more creative and add more value to the project.

## Summary

In the long term, learning to work with different people on different projects, and developing your ability to bring out the best in everyone, will make you a more valuable and respected project manager.

## The Stages of Team Development

As early as the 1970's, researchers were discovering that groups of individuals working together go through four distinct stages of development. The most famous representation of this model is Tuckman and Jensen's Forming, Storming, Norming, and Performing model. Over time an additional stage has been added to reflect the natural end to a group: Adjourning. The stages are similar to human development: infancy, childhood, adolescence, adulthood, and old age.

One of the roles for a group leader or facilitator is to help the team grow and develop. Sometimes a team is only together for a short, specific project, and you will try to move them to a productive stage as quickly as possible.

### Stage 1: Forming

#### Characteristics of this stage:

- Group members may be anxious, adopt a wait-and-see attitude, and/or be formal.
- No clear idea of goals or expectations.
- Members are unsure why they are there.
- Members need to get to know one another.

**What you can do to help:**

- Have the team write its own charter or mission statement and clarify their goals. Remember, goals must have personal buy-in.
- Help the team establish boundaries and determine what is expected.
- Assist team members to get to know each other doing a non-conflict laden task. This builds commitment toward one larger goal.
- Help them know what to expect; communicate and reassure.

**Stage 2: Storming**

**Characteristics of this stage:**

- Team members are eager to get going.
- Conflict can arise as people bring different ideas about how to accomplish goals and notice differences rather than similarities.
- Some members may drop out mentally or physically.

**What you can do to help:**

- Continue with no surprises.
- Communicate regularly.
- Tensions will increase; this is normal, so recognize and publicly acknowledge accomplishments.
- Keep in mind that conflict can be healthy.
- Lead and participate in meetings.
- Value diversity.
- Gather information and be supportive.
- To move to the next stage, encourage participants to put the needs of the group ahead of their personal interests.

**Stage 3: Norming**

**Characteristics of this stage:**

- People begin to recognize ways they are alike.
- They realize it's sink or swim; they're in this together.
- People become more social.
- Members may forget their focus in favor of having a good time.

**What you can do to help:**

- Recognize how they are alike.
- Help with training if applicable.
- Encourage them to feel comfortable with each other and with systems.
- Help the group stay focused on its goal.

Many groups don't make it to this stage, where there is much more cooperation and understanding than previous stages. Be observant of emerging group behaviors, encourage the team to express their differences positively, and help them stay focused on their objectives.

#### **Stage 4: Performing**

##### **Characteristics of this stage:**

- Team members are trained, competent, and able to do their own problem-solving.
- The leader will ask for critical self-assessment and look at ways to challenge and develop them.
- Members are mature and understand their roles and responsibilities.
- The team wants more input in processes.
- Everyone is self-motivated and self-trained.

##### **What you can do to help:**

- Recognize efforts.
- Encourage growth.
- Give new challenges.

This phase happens as a demonstration of high levels of trust. It can also be susceptible to "group think," so the leader must observe and ensure that individual ideas are requested and considered.

#### **Stage 5: Adjourning**

##### **Characteristics of this stage:**

- Group adjourns because they finish a defined project, they are no longer challenged, or new people join the team and that shifts the group into a previous stage.
- Group members are winding down and saying goodbye.
- Group members are setting goals for future work independently and/or as part of new groups.

##### **What you can do to help:**

- Celebrate everyone's participation.
- Describe what's going on and ensure people know what will happen next.
- Look for and encourage contribution from everyone as the group winds down.
- Encourage continued productivity.

## Managing Team Meetings

### Starting on the Right Foot

Here is a checklist of things that should be done before a team meeting:

#### Individual Meetings

Meet with team members and discuss:

- Why was this person selected?
- What are the performance expectations?
- What are their individual priorities?

#### Information Gathering

Obtain the who, what, where, when, why, and how for the project.

#### Agenda Planning

Now it's time to plan the team meeting. You will want to:

- Ensure that the proper individuals are invited
- Develop an agenda and set objectives
- Send the agenda and information requests to the team
- Book the appropriate space

#### During the Meeting

- Make sure the meeting starts on time
- Encourage open communication
- Take notes
- Set some ground rules
- Introduce the members of the team
- Cover one agenda item at a time
- Review the priorities for the project objectives and schedule
- Review main points of the project, including goals, budget, and completion date
- Review individual plans for getting work started
- Discuss methods and tools to be used to manage, control, and operate the project
- Establish the time and place for the next project meeting
- Agree on and reiterate any follow-up activities or action items

A major cause of frustration can be related to ineffective meetings, yet meetings are necessary to exchange information and coordinate activities. However, people at all levels of an organization need to know how to plan, conduct, and participate in meetings effectively.

## **Making Committees Work**

### **Setting Up a Committee**

Sometimes, a committee will be formed to complete a special task, such as expert analysis or policy review. A committee should be results-oriented and have a time frame for accomplishing results. Small committees usually function best, although its size can be determined by the expertise needed and should be representative of the larger group.

Committees function best when one member agrees to serve as leader and assumes the responsibilities of leadership. Committees then function as small groups, holding their own meetings for which they keep records and have an agenda.

### **Tips for Success**

The following guidelines can help you make the most of your committee:

- Schedule regular meetings and ensure that members commit to these meetings.
- Ensure that all members are clear on the committee's objective and when it is to be achieved by.
- Ensure that everyone knows what else is required of the committee. For example, detailed minutes may be required, or your organization may want a formal report after the committee has completed its work.
- Set up ground rules for your meeting, as well as a policy on how to deal with absent members.
- Make sure that you have the operational and legal authority to complete the assigned task.
- Know where to go for help and support.
- If you are the leader, understand how to chair an effective meeting. If you are a committee member, help each meeting be successful.

### **Test your knowledge**

**In your opinion, what makes a good meeting?**

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## Easy Ways to Reward Your Team

During all the commotion of working on your project, it can be easy to forget some of the things that are essential but easily passed by, like engaging the members of the team. Finding ways to reward and motivate your team is crucial to the success of the project and the happiness of your team members. Different things motivate different people, and a team can be motivated by different things than individuals. It's certainly easier to find out what motivates your individual team members and the team overall than to try and guess.

Below are our top suggestions for rewards.

- Always keep in mind the value of a sincere compliment. Saying, "Bob, you did a great job with that network diagram," might make that person's day.
- Have a treat at your status meetings. Even something as simple as a basket of fruit or small treat-size candy bars can be enough to motivate some people. Food is a great way to connect people, and your treat can be the same or different for each meeting.
- Turn brainstorming sessions into competitions. For example, whoever identifies the most risks may win a prize.
- Take time for team members to recognize the work their subcommittees or teams are doing. Take blank sheets of paper (the bigger, the better), write each team's name on one sheet of paper, and tape it to the wall. Then, give everyone colorful markers and ask them to write a compliment on each sheet of paper.
- Certificates of accomplishment are a wonderful reward. They can be serious ("Most tasks accomplished on time") or funny ("Best Bart Simpson impression"). You can distribute these in a number of ways: at status meetings, at milestones, or have a formal reward ceremony once the project is complete. Note that these must be funny without being embarrassing or insulting.
- Giving a team member more responsibility or a role they desire can be a great motivator.
- Surprise your team with a lunch.
- Include small gift certificates for movies or groceries with the weekly memo. We know of one company that rewarded staff with a certificate for an extra personal day.

- Of course, larger prizes and financial bonuses at the end of a successful project are always welcome.
- Find out what people want and make your bonuses fit. Something that you enjoy might not be looked upon the same way by people with food allergies or strong preferences. Be flexible, and remember that this is about your team and not you.

### Further Reading:

- ✓ *Baca, Claudia M. Project Management for Mere Mortals. Pearson Education, 2007.*
- ✓ *Baker, Kim, and Sunny Baker. The Complete Idiot's Guide to Project Management (4th Edition). Alpha Publishing, 2007.*

