Project Management Workbook

People Aspects

Contents

project management

project management, tools, process, plans and project planning tips

Here are the rules of project management. Project management skills are essential for project managers, and any other managers who manage complex activities and tasks, because complex tasks are projects. Project management skills are essential for any complex task, where different outcomes are possible, requiring planning and assessing options, and organizing activities and resources to deliver a result. Projects come in all shapes and sizes, from the small and straight-forward to extremely large and highly complex. Project management can be concerned with anything: people, products, services, materials, production, IT and communications, plant and equipment, storage, distribution, logistics, buildings and premises, staffing and management, finance, administration, acquisition, divestment, purchasing, sales, selling, marketing, human resources, training, culture, customer service and relations, quality, health and safety, legal, technical and scientific, new product development, new business development; and in any combination.

Project management, for projects large or small, should follow this simple process:

project management process

1. **Agree precise specification for the project.**
2. **Plan the project - time, team, activities, resources, financials.**
3. **Communicate the project plan to your project team.**
4. **Agree and delegate project actions.**
5. **Manage, motivate, inform, encourage, enable the project team.**
6. **Check, measure, review project progress; adjust project plans, and inform the project team and others.**
7. **Complete project; review and report on project performance; give praise and thanks to the project team.**

1. Agree precise specification for the project

Often called the project 'terms of reference', the project specification should be an accurate description of what the project aims to achieve, and the criteria and flexibilities involved, its parameters, scope, range, outputs, sources, participants, budgets and timescales (beware - see note below about planning timescales).

Usually the project manager must consult with others and then agree the project specification with superiors, or with relevant authorities. The specification may involve several drafts before it is agreed. A project specification is essential in that it creates a measurable accountability for anyone wishing at any time to assess how the project is going, or its success on completion. Project terms of reference also provide an essential discipline and framework to keep the project on track, and concerned with the original agreed aims and parameters. A properly formulated and agreed project specification also protects the project manager from being held to account for issues that are outside the original scope of the project or beyond the project manager's control.

This is the stage to agree special conditions or exceptions with those in authority. Once you've published the terms of reference you have created a very firm set of expectations by which you will be judged. So if you have any concerns, or want to renegotiate, now's the time to do it.

The largest projects can require several weeks to produce and agree project terms of reference. Most normal business projects however require a few days thinking and consulting to produce a suitable project specification. Establishing and agreeing a project specification is an important process even if your task is simple one.

A template for a project specification:

1. Describe purpose, aims and deliverables.
2. State parameters (timescales, budgets, range, scope, territory, authority).
3. State people involved and the way the team will work (frequency of meetings, decision-making process).
4. Establish 'break-points' at which to review and check progress, and how progress and results will be measured.

2. Plan the project

Plan the various stages and activities of the project. A useful tip is to work backwards from the end aim, identifying all the things that need to be put in place and done, in reverse order. First, brainstorming (simply noting ideas and points at random), will help to gather most of the points and issues. For complex

projects, or when you lack experience of the issues, involve others in the brainstorming process. Thereafter it's a question of putting the issues in the right order, and establishing relationships and links between each issue. Complex projects will have a number of activities running in parallel. Some parts of the project will need other parts of the project to be completed before they can begin or progress. Some projects will require a feasibility stage before the completion of a detailed plan.

project timescales

Most projects come in late - that's just the way it is - so don't plan a timescale that is over-ambitious. Ideally plan for some slippage. If you have been given a fixed deadline, plan to meet it earlier, and work back from that earlier date. Build some slippage or leeway into each phase of the project. Err on the side of caution where you can. Otherwise you'll be making a rod for your own back.

the project team

Another important part of the planning stage is picking your team. Take great care, especially if you have team-members imposed on you by the project brief. Selecting and gaining commitment from the best team members - whether directly employed, freelance, contractors, suppliers, consultants or other partners - is crucial to the quality of the project, and the ease with which you are able to manage it. Generally try to establish your team as soon as possible. Identifying or appointing one or two people even during the terms of reference stage is possible sometimes. Appointing the team early maximises their ownership and buy-in to the project, and maximises what they can contribute. But be very wary of appointing people before you are sure how good they are, and not until they have committed themselves to the project upon terms that are clearly understood and acceptable. Don't imagine that teams need to be full of paid and official project team members. Some of the most valuable team members are informal advisors, mentors, helpers, who want nothing other than to be involved and a few words of thanks. Project management on a tight budget can be a lonely business - get some help from good people you can trust, whatever the budget.

To plan and manage large complex projects with various parallel and dependent activities you will need to put together a 'Critical Path Analysis' and a spreadsheet on MS Excel or equivalent. Critical Path Analysis will show you the order in which tasks must be performed, and the relative importance of tasks. Some tasks can appear small and insignificant when they might actually be hugely influential in enabling much bigger activities to proceed or give best

results. A Gantt chart is a useful way of showing blocks of activities over time and at a given cost and for managing the project and its costs along the way.

Various project management software is available, much of which is useful, but before trying it you should understand and concentrate on developing the pure project management skills, which are described in this process. The best software in the world will not help you if you can't do the key things.

the project 'critical path analysis'

'Critical Path Analysis' sounds very complicated, but it's a very logical and effective method for planning and managing complex projects. This is how to create a critical path analysis. As an example, the project is a simple one - making a fried breakfast.

First note down all the issues (resources and activities in a rough order):

Assemble crockery and utensils, assemble ingredients, prepare equipment, make toast, fry sausages and eggs, grill bacon and tomatoes, lay table, warm plates, serve.

Note that some of these activities must happen in parallel. That is to say, if you tried to make a fried breakfast by doing one task at a time, and one after the other, things would go wrong. Certain tasks must be started before others, and certain tasks must be completed in order for others to begin. The plates need to be warming while other activities are going on. The toast needs to be toasting while the sausages are frying, and at the same time the bacon and sausages are under the grill. The eggs need to be fried last. A critical path analysis is a diagrammatical representation of what needs done and when. Timescales and costs can be applied to each activity and resource. Here's the critical path analysis for making a fried breakfast:

This critical path analysis example below shows just a few activities over a few minutes. Normal business projects would see the analysis extending several times wider than this example, and the time line would be based on weeks or months. It is possible to use MS Excel or a similar spreadsheet to create a critical path analysis, which allows financial totals and time totals to be planned and tracked. Various specialised project management software enable the same thing. Beware however of spending weeks on the intricacies of computer modeling, when in the early stages especially, a carefully hand drawn diagram - which requires no computer training at all - can put 90% of the thinking and structure in place.

Gantt charts

Gantt Charts are extremely useful project management tools. You can construct a Gantt Chart using MSExcel or a similar spreadsheet. Every activity has a separate line. Create a time-line for the duration of the project (the breakfast example shows minutes, but normally you'd use weeks, or for very big long-term projects, months). You can colour code the time blocks to denote type of activity (e.g. intense, watching brief, directly managed, delegated and left to run, etc.) You can schedule review and break points. At the end of each line you can show as many cost columns for the activities as you need. The breakfast example shows just the capital cost of the consumable items and a revenue cost for labour and fuel. A Gantt chart like this can be used to keep track of progress for each activity and how the costs are running. You can move the time blocks around to report on actuals versus planned, and to re-schedule, and to create new plan updates. Costs columns can show plan and actuals and variances, and calculate whatever totals, averages, ratios, etc you need. Gantt Charts are the most flexible and useful of all project management tools, but remember they do not show the importance and inter-dependence of related parallel activities, and they won't show the necessity to complete one task before another can begin, as a critical path analysis will do, so you need both tools, especially at the planning stage.

project financial planning and reporting

For projects involving more than petty cash you'll need a spreadsheet to plan and report planned and actual expenditure. Use MSExcel or similar. If you don't know how to put together a basic financial plan, get some help from someone who does, and make sure you bring a good friendly, flexible financial person into your team - it's a key function of project management, and if you can't manage the financial processes your self you need to be able to rely completely on whoever does it for you. The spreadsheet must enable you to plan, administer and report the detailed finances of your project. Create a cost line for main expenditure activity, and break this down into individual elements. Create a system for allocating incoming invoices to the correct activities (your bought-ledger people won't know unless you tell them), and showing when the costs hit the project account. Establish clear payment terms with all suppliers and stick to

them. Projects develop problems when team members get dissatisfied; rest assured, non- or late-payment is a primary cause of dissatisfaction.

Remember to set some budget aside for 'contingencies' - you will need it.

project contingency planning

Planning for and anticipating the unforeseen, or the possibility that things may not go as expected, is called 'contingency planning'. Contingency planning is vital in any task when results and outcomes cannot be absolutely guaranteed. Often a contingency budget needs to be planned as there are usually costs associated. Contingency planning is about preparing fall-back actions, and making sure that leeway for time, activity and resource exists to rectify or replace first-choice plans. A simple contingency plan for the fried breakfast would be to plan for the possibility of breaking the yolk of an egg, in which case spare resource (eggs) should be budgeted for and available if needed. Another might be to prepare some hash-browns and mushrooms in the event that any of the diners are vegetarian. It may be difficult to anticipate precisely what contingency to plan for in complex long-term projects, in which case simply a contingency budget is provided, to be allocated later when and if required.

3. Communicate the project plan to your team

This serves two purposes: it informs people what's happening, and it obtains essential support, agreement and commitment. If your project is complex and involves a team, then you should involve the team in the planning process to maximise buy-in, ownership, and thereby accountability. Your project will also benefit from input and consultation from relevant people at an early stage.

4. Agree and delegate project actions

Your plan will have identified those responsible for each activity. Activities need to be very clearly described, including all relevant parameters, timescales, costs, and deliverables. Use the **SMART acronym** to check that you delegate tasks properly. Delegated tasks fail mostly because they have not been explained clearly, agreed with the other person, or supported and checked while in progress. Publish the full plan to all in the team, but don't issue all the tasks unless the recipients are capable of their own forward-planning. For long-term complex projects you will not know exactly what the future tasks will be. Don't delegate anything unless it passes the SMART test.

5. Manage, motivate, inform, encourage, enable the project team

Manage the team and activities by meeting, communicating, supporting, and helping with decisions (but not making them for people who can make them for themselves). 'Praise loudly; blame softly.' (Catherine the Great). One of the big challenges for a project manager is deciding how much freedom to give for each delegated activity. Tight parameters and lots of checking are necessary for inexperienced people who like clear instructions, but this approach is the kiss of death to experienced, entrepreneurial and creative people. They need a wider brief, more freedom, and less checking. Manage these people by the results they get - not how they get them. Look out for differences in personality and working styles in your team. They can get in the way of understanding and co-operation. Your role here is to enable and translate. Face to face meetings, when you can bring team members together, are generally the best way to avoid issues and relationships becoming personalised and emotional. Communicate progress and successes regularly to everyone. Give the people in your team the plaudits, particularly when someone high up expresses satisfaction - never, never accept plaudits yourself. Conversely - you must take the blame for anything that goes wrong - never dump on anyone in your team (as project manager any problem is always ultimately down to you anyway).

6. Check, measure, and review project performance; adjust project plans; inform project team and others

Check the progress of activities against the plan. Review performance regularly and at the stipulated review points, and confirm the validity and relevance of the remainder of the plan. Adjust the plan if necessary in light of performance, changing circumstances, and new information, but remain on track and within the original terms of reference. Be sure to use transparent, pre-agreed measurements when judging performance. (Which shows how essential it is to have these measures in place and clearly agreed before the task begins.) Identify, agree and delegate new actions as appropriate. Inform team members and those in authority about developments, clearly, concisely and in writing. Plan team review meetings. Stick to the monitoring systems you established. Probe the apparent situations to get at the real facts and figures. Analyse causes and learn from mistakes. Identify reliable advisors and experts in the team and use them. Keep talking to people, and make yourself available to all.

7. Complete project; review and report on project; give praise and thanks to the project team

At the end of your successful project hold a review with the team. Ensure you understand what happened and why. Reflect on any failures and mistakes positively, objectively, and without allocating personal blame. Reflect on successes gratefully and realistically. Write a review report, and make observations and recommendations about follow up issues and priorities - there will be plenty.

Someone said 'Don't you love it when a plan comes together?' It's true. As project manager, to be at the end of a project and to report that the project plan has been fully met, on time and on budget, is a significant achievement, whatever the project size and complexity. The mix of skills required are such that good project managers can manage anything.

amusing project management analogies:

To the optimist, the glass is half full. To the pessimist, the glass is half empty. To the project manager, the glass is twice as big as it needs to be.

A clergyman, a doctor and a project manager were playing golf together one day and were waiting for a particularly slow group ahead. The project manager exclaimed, "What's with these people? We've been waiting over half and hour! It's a complete disgrace." The doctor agreed, "They're hopeless, I've never seen such a rabble on a golf course." The clergyman spotted the approaching green keeper and asked him what was going on, "What's happening with that group ahead of us? They're surely too slow and useless to be playing, aren't they?" The green keeper replied, "Oh, yes, that's a group of blind fire-fighters. They lost their sight saving our clubhouse from a fire last year, so we always let them play for free anytime." The three golfers fell silent for a moment. The clergyman said, "Oh dear, that's so sad. I shall say some special prayers for them tonight." The doctor added, rather meekly, "That's a good thought. I'll get in touch with an ophthalmic surgeon friend of mine to see if there's anything that can be done for them." After pondering the situation for a few seconds, the project manager turned to the green keeper and asked, "Why can't they play at night?"

A project manager was out walking in the countryside one day when a frog called out to him. He bent down, picked up the frog and put it in his pocket. The frog called out again, saying, "If you kiss me I shall turn me back into a beautiful

princess, and I'll stay with you for a week as your mistress." The project manager took the frog out of his pocket, smiled at it, and put it back into his pocket. The frog called out once more, "If you kiss me and turn me back into a princess, I'll stay with you for as long as you wish and do absolutely *anything* that you want. Again the Project manager took the frog out of his pocket, smiled at it and put it back. Finally, the frog demanded, "What's the matter? You can turn me back into a beautiful princess, and I'll stay with you for ever and do anything you want. Why won't you kiss me?" to which the project manager replied, "Understand, I'm a project manager. I simply don't have time for a girlfriend, but a talking frog ……. that's cool."

(Ack. G Bee)

Project Management Case Study – Background

You have just been informed of your appointment to lead a new project approved by the Projects Steering Group. Your director has bee appointed by the project sponsor and you are told that you must be prepared to give 50 per cent of your time to the project and assign some of your current responsibilities to other members of your departmental team. The initial proposal document you are given was prepared by someone else some three months earlier and this divided the project into some discrete parts:

- Data gathering
- Development
- Prototype testing
- Final testing
- Implementation and training
- Support and maintenance services

The budget approved for the project is based on a core team of six people with additional team support as required during the project life. However, your sponsor informs you that even though this is regarded by the organisation as an important high profile project, only five people can be spared at the current time due to workload. All the core team member allocations have been agreed with their line managers.

The project is important and the deliverables listed in the original proposal are regarded as still valid and essential to the organization.

The "business critical date" for the project has been fixed by its interface with another project currently active at another location. This date effectively gives you 58 calendar weeks from now to complete the project. It has been made very clear that the directors regard this project as having a "MUST NOT FAIL" label and that no slippages will be tolerated.

Only one of the team members is known to you, having worked with you before in the same team on a previous project. One member of the team has been assigned at your request. As you have little information on the other team members you call the Personnel Manager and ask for a brief note of their backgrounds with particular reference to project work. The response you receive gives you only some basic information.

Your Team

Graham

A very experienced person with over 15 years with the organisation. He worked with you previously on the DAMOS project and you value his knowledge and project skills. You feel fortunate to have him assigned full time on the project although you know he is regarded as being difficult sometimes. He has a reputation for being dogmatic and scornful of others' ability in comparison to his long experience. This makes him a little cynical about some modern technology and ideas that he has not generated. Apparently, for the next four weeks he has a little "tidying-up" to do on the last project.

Alison

An experienced person with some specific skills needed on this project. Her release for this project is full time but apparently this has been imposed on her line manager who is not happy about the situation. You expect this to lead to some conflict problems about work prioritization as her line manager continues to try to assign her work. She has been with the organisation since leaving university and although she has worked in various departments during the past ten years, there has been no significant increase in her responsibilities. She is a popular person and very participative in the social activities in the organisation.

Ian

You asked for Ian, knowing that he has a detailed knowledge and interest in the project. He is a quiet, academic type with an analytical approach which you feel will be valuable to the work ahead. Like many academic types he often gives the appearance of being quite disorganised. Ian will give 60 per cent of his time to the project and, having two people reporting to him, can easily pull in additional resource support.

Dave

He is a young business graduate almost at the end of his first year with the organisation. His manager requested his assignment to the project as an opportunity to experience project work under your guidance. What he lacks in experience is made up for by his enthusiasm and keenness to learn. He will be full time on the project.

Janet

Janet is a very competent analyst who joined the organisation form a competitor two years ago, bringing with her a good knowledge of the market place. Her marketing experience has quickly gained her a reputation in the organisation and her opinions are highly regarded by the directors. She has a strong commitment to her work and is intolerant of poor quality work and incompetence. She will be assigned 70% of her time to the project, but must give time to her work associated with another project launching a new product.

After some discussions with your project sponsor you accept who is to join the project team and you review the information you gather about each. You the decide the first step is to get the team together, so you prepare a short memo asking them to attend an initial kick-off meeting five days from now. Having issued the memo you organize a meeting room and start thinking about the problems you may face and how you will conduct this meeting.

Case Study – Scenario 1

1. Identify the issues that you think you will have to address from the knowledge that you have at the moment about the project and the people involved.
2. The day of your first team meeting has arrived and is due to start in half an hour. Everyone has confirmed their attendance. They have no details of the project except that they have been told that the project assignment will be for 12 months. Your sponsor has also confirmed he will be present. A good strategy for this kick-off meeting is:

a. Explain the project overall objectives and ask them for their ideas and suggestions to identify how to approach the project.
b. Ask the sponsor to introduce the project and emphasise the project context and importance to the organisation. Then introduce your thoughts on the processes to follow for the project.
c. Explain the technical details of the project and what is expected by the organisation. Focus the team to discuss how these can be achieved.

Case Study – Scenario 2

At your project kick-off meetings your project sponsor has described the organisation's expectations of the work that you and the team must carry out. In the discussion that follows the team identify that the deliverables of the project for the named customer will be very similar to those required by another internal customer. Although the project has been initiated by one customer you should:

a. Decide to ignore this information as it is only based on rumour and is not a formal request for a project. Focus the team on the known customer.

b. Assign tasks to the team to determine unofficially if a competitive project is about to start.

c. Tell the team you will send a memo to all divisional managers informing them about this project and ask them directly about their possible future interest.

OR

Is there another option you would take?

Case Study – Scenario 3

You have called the team together for a brainstorming session to assess the risks. As the meeting progresses, Janet seems to become increasingly negative about the project, saying that the risks are now so great that the project should be aborted now. This is having a negative effect on the rest of the team. You should:

a. Ignore the negative opinions and encourage the team to continue. Have a word with Janet after the meeting.

b. Focus the team on the challenge ahead, reminding them that all projects have risks and it is everyone's responsibility to identify the risks and focus on avoiding them as much as possible.

c. Close the meeting and continue the risk assessment without team involvement, making a decision to reconsider whether the negative team member should remain in the team.

Case Study – Scenario 4

You have brought the team together for the first planning session having told them last week of the meeting date, asking each to think about the project and the work that they feel may be required. As you open the meeting, Graham tables a draft plan with all the key stages of the project derived and durations added to give the desired completion date. You are surprised but must now decide to:

a. Thank Graham for his efforts and ask the rest of the team to review the draft plan to seek a consensus view of its accuracy. Make a note to talk to Graham later about teamwork.

b. Thank Graham but diplomatically set his plan to one side and ask each team member to develop their own plans for their part of the work for discussion at another meeting of the team tomorrow.

c. Accept the plan and ask each team member to use it to develop their detailed parts of the plan within the fixed timescales of the draft plan.

Case Study – Scenario 5

Your team is having some difficulty laying out realistic schedules to meet the customer's expectations. You are being asked many questions and they seem to be approaching the scheduling in the right way but are having trouble coming to consensus decisions. The detailed planning is taking much longer than you expected, so you should now:

a. Leave the team to carry on with their work and eventually come to a conclusion as they will learn form the experience.

b. Give the team your ideas on how to resolve their problems and hope that this will encourage their own creativity and lead to effective schedules.

c. Participate in the work yourself and facilitate the planning until an acceptable schedule is derived.

Case Study – Scenario 6

The second phase of the project is a significant proportion of the work involving several people in a particular department. They have all been closely involved in planning this phase. The manager has sent you a memo asking for your performance evaluation of all his staff assigned to do project work. Your team have been working closely with these people, so you should:

    a. Respond promptly and point out that performance issues are part of his or her job, not yours.

    b. During your one-to-ones with team members, make this an additional responsibility for them and seek their evaluations for your report.

    c. Call the team together and tell then of the request. Then work together to evaluate each individual assigned and agree what to report.

Case Study – Scenario 7

The customer unofficially informs you that he has a problem and this could result in some changes to the requirements. This could spell disaster for your project. The customer has asked for a meeting within the next week at your office to discuss the details. To prepare for this formal meeting you should:

a. Call an immediate meeting of the team and ask them to prepare an agenda for the meeting, identifying the issues to discuss.

b. Ask the team to improve productivity before the meeting as this would impress the customer and show that you are doing a good job.

c. Ask all of the team to ensure that all their reports and project records are accurate and updated and prepare status reports for all key stages of the project.

OR

Is there another action you would consider?

Case Study – Scenario 8

You have completed the first phase of the project and the results and outputs were not quite what you expected. This affects the estimates for the next phase and highlights that your original estimate were too optimistic. You are now facing a probable slippage of twp weeks to the project completion date. Your customer is not going to be happy about this, so you must:

a. Ask the team to meet and seek some way of improving their productivity for the next phase, hoping they will come up with a solution.

b. Ignore the slippage at this stage. These problems occur in projects and eventually sort themselves out. You feel that you can still motivate the team to meet the completion date.

c. Call a team meeting and emphasis that this is a crisis for the project. Work with the team to review the estimates and the project logic to find a way to restore the scheduled completion date.

Case Study – Scenario 9

You are now three-quarters of the ay through the project. You have accepted some earlier customer changes and rescheduled the project to everyone's satisfaction. You now receive a call from the customer asking for an immediate assessment of the consequences of canceling the project immediately. It is stated that another project is planned and you may be given the job. You should:

a. Decide not to involve the team at this stage as the work is progressing very well. You have had these scare messages before and nothing has resulted. Review the consequences yourself.

b. Call the team together, expose the request and assess the risks and possible consequences, stressing that work must not be suspended as these things often happen.

OR

Is there some other action you can take?

Case Study – Scenario 10

Your team has taken a very optimistic approach to the project schedule. Some line managers have refused to support these schedules. Your team expected to be involved in discussions to optimize the schedules and reach mutual agreement. You feel you might need to get involved and should:

a. Ask the team to meet and discuss ways to resolve the conflict and derive possible solutions. Stress you are available for advice if necessary.

b. Meet with the line managers to understand why they have rejected the schedules then call a special team meeting and resolve the conflict by changing the schedules.

OR

Is there another option?

Case Study – Scenario 11

You are becoming increasingly concerned about Ian's performance, which seems to be deteriorating. He is a very quiet, almost introverted type and you are unsure whether he has a personal problem or is finding the work pressure too high. You should:

a. Call a team meeting and open a discussion about how performance and productivity is not as good as at the outset. Ask the team to derive some ideas for action to improve things.

b. Do nothing for now. It may be a personal problem which will work itself out and performance will be restored to recover any lost time.

c. Have a one-to-one discussion with Ian and try to get him to see his own performance issue. Try to help him to understand the real cause and how to derive a solution.

Case Study – Scenario 12

At a regular progress team meeting it becomes apparent that one particular department is having difficulty meeting deadlines. Data and reports eventually get issued but usually late and this is frustrating the team. It appears that all documentation is being channeled via the manager's desk, leading to hold-ups. This manager has a reputation for such behaviour, insisting she sees everything leaving her department. She has apparently caused this problem on other projects over the past three years and insists on running her department this way. You should:

a. Set up another team meeting later the same day to find ways of obtaining the project data and reports without interfering with the departmental policies.

b. Ignore the issue and treat it as a common and normal difficulty of project work. The data and reports do get through eventually.

c. As the project manager, make a note to seek a one-to-one discussion with the manager right away to resolve the issue and ensure that your team get the reports on time.

Case Study – Scenario 13

You are entering the final phase of the project with six weeks to the completion day. Alison informs you that her manager has offered her an opportunity to be the project manager of a new project set to kick off in two weeks. She is excited about her first real increase in responsibility in her ten years with the company. Alison has come to see you and has asked to be released from your project. Should you:

    a. Call a team meeting immediately, tell then the situation and lead a discussion into how this will impact on the project and what solutions they can derive to take on Alison's workload.

    b. Have a one-to-one discussion with Alison and stress how important it is for her to stay with your project through to completion. Explain how you think her departure could threaten the project.

OR

       Do you have another option?

Case Study – Scenario 14

So your project has finally reached hand over point. The team feel justifiably pleased with the results and the customer seems to be happy. You know that there is one final thing to do: evaluate the work done and produce a final report. This could lead to more projects for you and the team, so you:

a. Tell the team they have done a great job and there is now one task remaining, Ask them to meet and evaluate the project and then agree the outline, structure and contents of the final report.

b. Call a team meeting and conduct a structured evaluation, then explain the structure of the report and assign tasks for individual sections to the team members. The final report should reflect on your leadership ability and everyone's performance.

OR

Do you have another option?

About Team Roles

PLANTS (PL)

Characteristics

Plants are innovators and inventors and can be highly creative. They provide the seeds and ideas from which major developments spring. Usually they prefer to operate by themselves at some distance from the other members of the team, using their imagination and often working in an unorthodox manner. They tend to be introverted and react strongly to criticism and praise. Their ideas may often be radical and may lack constraint.

Plants can be observed gazing out of the window with their feet on the desk. Others tend to think that they do little or no work but this is a plant thinking and creating new ideas and innovations.

They are independent, clever and original, but may be weak in communicating with other people whom they perceive to be on a different wavelength.

FUNCTION

The main use of a Plant is to generate new proposals and to solve complex problems. Plants are often needed in the initial stages of a project or when a project is failing to progress. Plants have usually made their mark as founders of companies or as originators of new products.

Too many Plants in one organisation, however, may be counter productive as they tend to spend their time reinforcing their own ideas and engaging each other in combat. They can also have difficulty in evaluating and implementing their own ideas without help.

Please bear in mind that we are generally a complex mix of a number of different team roles and that the description given above only reflects one particular role.

About Team Roles

RESOURCE INVESTIGATORS (RI)

Characteristics

Resource Investigators are often enthusiastic, quick-off-the-mark extroverts. They are good at communicating with people both inside and outside the company. They are natural negotiators and are adept at exploring new opportunities and developing contacts. Although not a great source of original ideas, the Resource Investigator is effective when it comes to picking up other people's ideas and developing them. As the name suggests, they are skilled at finding out what is available and what can be done. They usually receive a warm reception from others because of their own outgoing nature.

Resource Investigators have relaxed personalities with a strong inquisitive sense and a readiness to see the possibilities in anything new. However, unless they remain stimulated by others, their enthusiasm rapidly fades as they have a low boredom threshold.

FUNCTION

Resource Investigators are good at exploring and reporting back on ideas, developments or resources outside the group. They are the best people to set up external contacts and to carry out any subsequent negotiations.

They have an ability to think on their feet and to probe others for information but require backup when it comes to the routine tasks and the paperwork. Let them do what they are good at, dealing with people.

Please bear in mind that we are generally a complex mix of a number of different team roles and that the description given above only reflects one particular role.

About Team Roles

MONITOR EVALUATORS (ME)

Characteristics

Monitor Evaluators are serious-minded, prudent individuals with a built-in immunity from being over-enthusiastic. They are slow in making decisions, preferring to think things over. Usually they have a high critical thinking ability.

They have a capacity for shrewd judgments that take all factors into consideration. A good Monitor Evaluator is seldom wrong. They don't say much at times, but when they do, it is generally worth listening. They can be a little insensitive to other people, as they tend to be task orientated.

FUNCTION

Monitor Evaluators are best suited to analysing problems and evaluating ideas and suggestions. They are very good at weighing up the advantages and disadvantages of options. To many outsiders the Monitor Evaluator may appear as dry, boring or even over-critical. Some people are surprised that they become managers. Nevertheless, many Monitor Evaluators occupy strategic posts and thrive in high-level appointments. In some jobs success or failure hinges on a relatively small number of crunch decisions. This is ideal territory for a Monitor Evaluator, for the person who is never wrong is the one who scores in the end.

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About Team Roles

CO-ORDINATORS (CO)

Characteristics

The distinguishing feature of the Co-ordinator is their ability to cause others to work towards shared goals. Mature, trusting and confident, they delegate readily. In interpersonal relations they are quick to spot individual talents and to use them in the pursuit of group objectives. They are often described as having 'presence or charisma'.

While Co-ordinators are not necessarily the cleverest members of a team, they have a broad and worldly outlook and generally command respect. They seldom take the credit for others ideas or hard work, making them a good leader in many respects.

FUNCTION

Co-ordinators are well placed when put in charge of a team of people with diverse skills and personal characteristics. They perform better in dealing with colleagues of near or equal rank than in directing junior subordinates. Their motto might well be *'consultation with control'* and they usually believe in tackling problems calmly. In some firms, Co-ordinators are inclined to clash with Shapers due to their contrasting management styles.

Note - Co-ordinators are referred to as Chairmen in *Management Teams: Why They Succeed or Fall* (1981) R M Belbin.

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About Team Roles

SHAPERS (SH)

Characteristics

Shapers are highly motivated people with a lot of nervous energy and a great need for achievement. Usually they are aggressive extroverts and possess strong drive. Shapers like to challenge others and their concern is to win. They like to lead and to push others into action. If obstacles arise, they will find a way round. Headstrong and assertive, they tend to show strong emotional response to any form of disappointment or frustration.

Shapers are thick skinned and argumentative and may lack interpersonal understanding. Theirs is the most competitive team role. They dislike criticism and can be unaware that they have upset others.

FUNCTION

Shapers generally make good managers because they generate action and thrive under pressure. They are excellent at sparking life into a team and are very useful in groups where political complications are apt to slow things down. Shapers are inclined to rise above problems of this kind and forge ahead regardless. They are well suited to making necessary changes and do not mind taking unpopular decisions. As the name implies, they try to impose some shape or pattern on group discussion or activities. They are probably the most effective members of a team in guaranteeing positive action.

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About Team Roles

TEAM WORKERS (TW)

Characteristics

Team Workers are the most supportive members of a team. They are mild, sociable and concerned about others. They have a great capacity for flexibility and adapting to different situations and people. Team Workers are perceptive as being diplomatic. They are good listeners and are generally popular members of a group. They operate with sensitivity at work, but they may be indecisive in crunch situations.

They can be unaware of the important role that they play in a team situation. They are 'the oil in the engine'. And without oil, the engine stops running.

FUNCTION

The role of the Team Worker is to prevent interpersonal problems arising within a team and thus allows all team members to contribute effectively. Not liking friction, they will go to great lengths to avoid it. It is not uncommon for Team Workers to become senior managers especially if Shapers dominate line managers. This creates a climate in which the diplomatic and perceptive skills of a Team Worker become real assets, particularly under a managerial regime where conflicts are liable to arise or to be artificially suppressed. Team Worker managers are seen as a threat to no one and therefore the most accepted and favoured people to serve under. Team Workers have a lubricating effect on teams. Morale is better and people seem to co-operate better when they are around.

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About Team Roles

IMPLEMENTERS (IMP)

Characteristics

Implementers have practical common sense and a good deal of self-control and discipline. They favour hard work and tackle problems in a systematic fashion. On a wider front the Implementer is typically a person whose loyalty and interest lie with the Company and who is less concerned with the pursuit of self-interest. However, Implementers may lack spontaneity and show signs of rigidity and are often not able to come up with new ideas.

FUNCTION

Implementers are vital to an organisation because of their reliability and capacity for application. They succeed because they are efficient and because they have a sense of what is feasible and relevant. It is said that many executives only do the jobs they wish to do and neglect those tasks, which they find distasteful. By contrast, an Implementer will do what needs to be done. Good Implementers often progress to high management positions by virtue of good organisational skills and competency in tackling necessary tasks.

Note - Implementers are referred to as Company Workers in *Management Teams: Why They Succeed or Fail.* (1981) R M Belbin

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About Team Roles

COMPLETER-FINISHERS (CF)

Characteristics

Completer-Finishers have a great capacity for follow-through and attention to detail. They are unlikely to start anything that they cannot finish. They are motivated by internal anxiety, yet outwardly they may appear unruffled. Typically, they are introverted and require little in the way of external stimulus or incentive. Completer-Finishers can be intolerant of those with a casual disposition. They are not often keen on delegating, preferring to tackle all tasks themselves as they can consider that nobody else can do it as well as they can.

FUNCTION

Completer-Finishers are invaluable where tasks demand close concentration and a high degree of accuracy. They foster a sense of urgency within a team and are good at meeting schedules. In management they excel by the high standards to which they aspire, and by their concern for precision, attention to detail and follow-through.

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About Team Roles

SPECIALISTS (SP)

Characteristics

Specialists are dedicated individuals who pride themselves on acquiring technical skills and specialised knowledge. Their priorities centre on maintaining professional standards and on furthering and defending their own field. While they show great pride in their own subject, they usually lack interest in other peoples. Eventually, the Specialist becomes the expert by sheer commitment along a narrow front. There are few people who have either the single-mindedness or the aptitude to become a first-class Specialist.

FUNCTION

Specialists have an indispensable part to play in some teams, for they provide the rare skill upon which the firm's service or product is based. As managers, they command support because they know more about their subject than anyone else and can usually be called upon to make decisions based on in-depth experience.

In other situations they are brought in as and when required to provide the specialist knowledge that may be required.

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SITUATIONAL LEADERSHIP

Introduction

Over many years, people in the field of management have been involved in the search for a 'best' style of leadership. Yet, all the evidence from research clearly shows that there is no single 'all-purpose' style. Successful leadership is determined by what is appropriate in THAT situation at THAT time; effectiveness is more likely to depend on what a leader does rather than what he is.

The theory is based on the amount of 'task' behaviour and the amount of 'relationship' behaviour a leader must provide - given the situation and the 'level of maturity' of the individual. 'Task' behaviour is the extent to which a leader engages in one-way communication, by explaining what each is to do, as well as when, where and how tasks are to be accomplished.

'Relationships' behaviour is the extent to which a leader engages in two-way communication by providing social, feelings, involvement, psychological 'strokes' and helpful behaviour. Given the two types of behaviour, it is recognised that effective leadership depends on a third dimension, the maturity of the individual. Maturity is defined as the capacity to set high but attainable goals and to be motivated by achievement, be willing and able to take responsibility, the level of experience, education, training etc., the ability to do the job and motivated to do it.

These aspects of maturity should be considered against each specific task. An individual cannot be considered mature or immature in any total sense, no one is capable of tackling every kind of job, and the ability will vary as will the maturity.

As the level of maturity of an individual increases in terms of doing a specific job, so the leaders behaviour will change, by reducing the level of task behaviour and increasing the level of relationship behaviour. As the individual moves into an above average of maturity it becomes appropriate for the leader to decrease not only the task but also the relationship behaviour. Now the individual is mature in terms of ability and willingness.

The individual is now fully self-motivated regarding that specific job. It does not mean that the individual can now take on a new job without first carefully considering all aspects of maturity relating to the new job.

The main benefits of situational leadership is the assistance it gives in helping to manage change. New technology, systems etc., can best be implemented by following the curve of success through the four styles, opening the channels of communications and motivating individuals to grow and achieve.

STYLE ONE "TELLING"

Characterised by one-way communication in which the leader defines the roles of followers and tells them what, how, when and where to do various tasks.

What is this style?

The leader is very involved in the detail of what is going on. He or she instructs carefully and monitors performance. Low or unsatisfactory standards are quickly identified and pointed out. The leader is careful not to be seen as a "soft touch". The leader makes it quite clear what is expected and insists on improvement. Much attention is paid to the development of skill and competence.

When to use it

"Telling" is appropriate when individuals and groups are unable to tackle the task in hand and lack the will to learn for themselves. This approach is especially useful with new recruits or when improving departments which have been allowed to "go to seed".

What to do

- *be clear about your own standards.*
- *organise work.*
- *define roles carefully.*
- *explain where, when and how.*
- *demonstrate and instruct.*
- *develop basic skills.*
- *check performance.*
- *give feedback.*
- *discipline where necessary.*
- *reinforce good work by praise.*
- *be considerate but firm.*
- *emphasis on performance.*
- *show interest in learning problems.*

STYLE TWO "SELLING"

Most of the direction is still provided by the leader. He or she attempts to get the followers to 'buy into' decisions that have to be made.

What is this style?

The leader is very active and takes plenty of initiatives. It is clear that he or she is "in charge". Much time is spent directing, instructing and monitoring performance, however, effort is also devoted in getting to know individuals and developing rapport. Two-way communication is encouraged. Standards are clearly identified but the reasons why things are done is explained. The follower is encouraged to feel personally involved in success.

When to use it

"Selling" is appropriate when people have certain basic skills but a great deal to learn. This style is suitable for groups or individuals, which have some willingness but need to be encouraged otherwise they could easily lapse. They may have production problems that they are unable to solve by themselves.

What to do

- spend time with each individual.
- identify topics of common interest - "build bridges".
- develop pride in achievement.
- explain 'why' things are done.
- emphasis on standards.
- teach effective procedures (a systematic approach)
- be directive when necessary.
- monitor against standards.
- reward positive behaviour.
- give direction.
- instruct/train to improve competence.

STYLE THREE "PARTICIPATING"

The leader and follower(s) now share in decision making through two-way communication and much facilitating behaviour from the leader.

What is this style?

The leader focuses on improving the morale and "process" skills of the individual or group. This means that he or she does not attempt to control every aspect of the task but supports others so that they achieve themselves. People are taught to tackle and solve their own problems rather than be spoon-fed. The aim is to develop genuine participation. Direction is kept to a minimum although the leader deals with exceptional circumstances. Views are invited and heard. Good personal relations are cultivated and people feel they have significant discretion.

When to use it

With individuals and groups who have the basic skills and competence to handle most aspects of the task. However, sometimes the additional experience and skill of the leader is required. Also the individual or group is not ready to assume full responsibility and requires support, guidance or the service of a catalyst.

What to do

- *limit your desires to control and direct.*
- *set up systems for people to monitor themselves.*
- *develop effective work methods (process skills).*
- *counsel on problems.*
- *communicate widely.*
- *ask for ideas and opinions and act on them.*
- *act as a catalyst.*
- *encourage an open climate.*
- *give and receive feedback.*
- *hand over objectives without saying 'how' they are to be achieved.*
- *share in decision making processes.*
- *give increasing authority/responsibility/accountability.*

STYLE FOUR "DELEGATING"

Letting the follower(s) 'run their own show'.

What is this style?

The leader has recognised that the individual or group are competent and willing to undertake the task. Genuine discretion can be given. The individual who provides the skills, initiatives and energy can tackle much of the work. Detailed supervision would be irrelevant. Much of the leader's time is spent doing other things. Day-by-day monitoring and control is administered by the follower(s).

When to use it

With individuals or groups who are experienced and have well-tested competence. They want to devote their energies to doing a good job and can be relied upon to complete tasks despite difficulties.

What to do

- *examine your own attitudes to trusting others!*
- *clarify and agree objectives.*
- *give support when requested.*
- *help make resources available.*
- *avoid interfering.*
- *represent to others if necessary.*
- *pace your delegations (not too much at once).*
- *agree what "progress" means.*
- *define limits of authority and responsibility.*
- *ensure, periodically, that progress is reported/reviewed*
- *insist on honesty and openness.*
- *check that ability and willingness remains high.*