The Engagement Matrix

Actionable Options for Supervisors and Project Managers

David B. Newman
& Lisa Hammer

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& LISA HAMMER

Leadership Techniques, LLC
Millsboro, DE
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Advance Praise for
The Engagement Matrix

"Lisa and Dave have done it! They've found the winning management perspective for engaging stakeholders. In easy-to-digest terms (and progressively sized quadrants), this book provides a recipe for moving teams from average to excellent."

— Carl Pritchard, PMP, PMI-RMP and PMI
"Best of the Best" 2019 award winner

"Dave and Lisa have developed a fantastic tool for managers that is easily understood and even more easily put into use. I've always been impressed by their professionalism and ability to effectively convey information, and their book does not disappoint. Their matrix is impressive and the book provides the insight necessary to use it effectively.

Growth of a full-scale, fully involved, and engaged team doesn't just happen – the manager must lead. In my twenty-plus years of management I've learned that a fully engaged team will work more cohesively on the project and I'll get a better result. The easy part of a management position is dispensing the knowledge that you-yourself hold. The most difficult aspect of management is providing leadership for people. Leading, not dragging or forcing or coercing. It's the single reason many leaders fail, and their inability to lead ends with project failure and unhappy employees.

Leadership is more than job knowledge. Both Lisa and Dave are experts in teaching how to lead. In order to be effective, leaders need to know how to assist their employees in team development and mentality. The matrix they've developed helps you understand that you are more than a manager. You are the coach, the planner, the director, and a working member of the team, as well as being the one responsible for failure. It means getting employees to engage and be willing and motivated, maybe even eager, members of a team. Dave and Lisa have the tools that enable managers to become leaders. They have helped me to hone my leadership skills and provided motivational techniques that encourage my teams to engage in a meaningful and impactful way."

— Diane Fouché, CPPB, CPPO, PMP,
Director, Procurement & Contracting Office,
Frederick County Government

"I always worry when long standing personal friends and professional peer as you to review and comment on a new book that they have written. I don't want to take exception to what they claim or how they claim it. Sometimes, I find a rational excuse to pass. But not for Lisa Hammer and David B. Newsome. I have long admired what these two PM masters do. And this new book is no exception.

As I began to assess the content it became clear that what these two innovative thinkers have done is create something that could establish a new paradigm for project managers, leaders and supervisors. They have produced what they call in the music business a "mashup". In this case the contributors to David and Lisa's mashup are very famous people indeed. People who have had monumental contributions to the field of psychology and its application to management: The Strength Deployment Inventory (Dr. Elias Porter); Situational Leadership Model (Ken Blanchard), Tuckman Model (Bruce Tuckman) and Maslow's Hierarchy of Needs (Abraham Maslow).

To be mentioned in the same breath as these four stalwarts of their profession is in itself an honor, but the creation of *The Engagement Matrix* by Lisa and David provides sort of an all-in-one aid to improving performances for project managers leaders and supervisors. This unique Engagement Matrix may be the future and I am happy to have had a chance to be one of the first readers of this seminal contribution to the profession."

— Lee Lambert, PMI Fellow and Founder of the PMP

"I'm very excited for the release of your book. Stakeholder engagement (or lack thereof) is where many endeavors are won or lost. PMI recognized this when they carved out Project Stakeholder Management as its own knowledge area in PMBOK 5. Clearly you see the need for engaged stakeholders, and your dimensional model is abundantly well-researched and thought provoking. It is a great framework, and I look forward to using it in the future."

— Bob Foster, PMP, DASM,
Managing Member at Graybird Innovations, LLC

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Introduction: The Tool You Need to Lead

AN ENORMOUS ASSORTMENT of existing project management literature and guidance is related to the fields of information technology, software development, and construction, while a great deal of project management has absolutely no relationship with any of those fields. Project management has application across all industries and every field of study. There is literally no limit to the opportunities available to project managers.

At the core of project management, and indeed leadership itself, is stakeholder engagement. While there are many tools referenced within *The Engagement Matrix* that are, in fact, project management tools-of-the-trade, so to speak, *The Engagement Matrix* itself is not solely focused on project management but on the role of frontline leaders and middle managers as well as project managers. Middle management is a large expanse of roles, and many of us spend our lives somewhere in middle management. Not all middle managers end up in senior management. However, we think it's safe to say that few senior managers rose to that level after being failures as middle managers. Most senior managers were middle managers, and they were probably pretty good at it. So, regardless of your ambitions, our immediate goal is to help those of you in frontline leadership roles to be prepared for the barrage of challenges and issues that will come your way, and this tool is intended to help you manage and lead on the front lines today.

The Engagement Matrix includes actions that you can use now! In the following pages, we will explain how *The Engagement Matrix* works. We need to first state that project management is complex because it is multi-dimensional. It primarily involves the leadership of people toward an organizational goal. It also involves management of materials, data, budgets, and more. This is layered into the organizational structures of the client organization as well as all stakeholder organizations.

The Engagement Matrix is a multi-dimensional tool that you can use to improve stakeholder communications while leading your teams to greater levels of achievement than you may have thought possible!

The three distinct dimensions of *The Engagement Matrix* are as follows:

- Dimension 1, the performance management dimension, is all about engaging with key stakeholders including our team.
- Dimension 2, the collaboration dimension, is all about engaging with your colleagues and counterparts.
- Dimension 3, the strategy dimension, is all about engaging with strategic levels of the organization and senior management. (See Exhibit 1.)

Dimension 1 of *The Engagement Matrix* is a performance management tool that will help you proactively assess and address team performance quickly and effectively. Whether it's pinned to the wall next to your desk or on your computer desktop as a background, it provides a fast and efficient method for continuously assessing performance. It is a performance management tool that is especially useful for leading without authority (although we think that authoritative leaders will find it helpful as well).

Dimension 2 is a communications tool that helps us analyze and understand our stakeholders so that we can create effective information flows that get the right information to the right people at the right time. An effective information flow minimizes interruptions and serves to optimize productivity!

Dimension 3 is a strategic tool that we can use to manage up and across our organizations. Understanding when and how to communicate with senior management may feel challenging to frontline leaders because the style needed (usually brief and high-level) often contrasts with the level of detail dictated by the daily needs

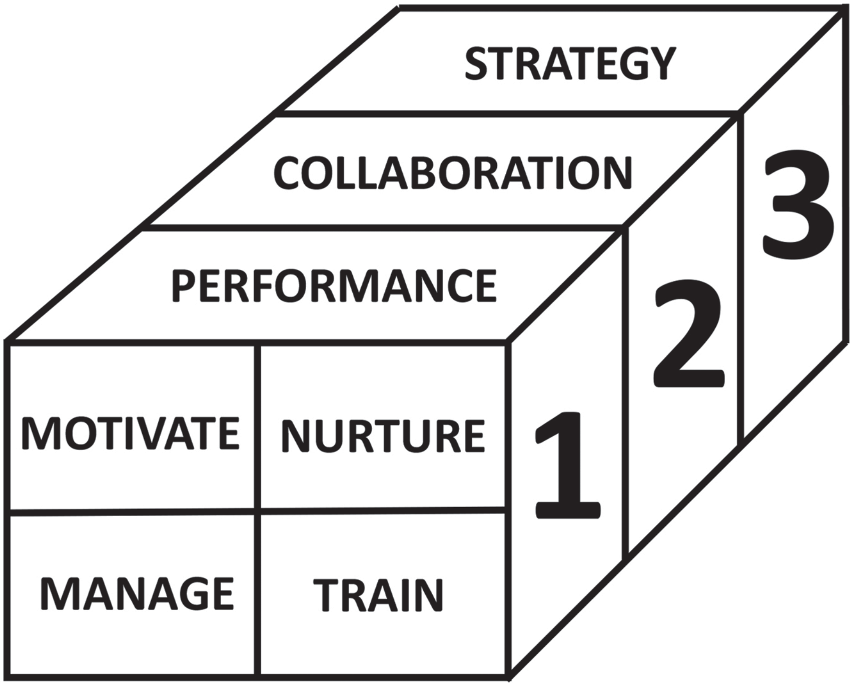

Exhibit 1: The Engagement Matrix *Dimensions*

of the team. Have you ever been asked a question by a senior manager and had your answer cut short because you were too deep in the weeds? Dimension 3 provides tools and options to help you be better prepared for those moments, turning them from embarrassing missteps into opportunities that can shine a light on your team and reflect positively on you!

The Engagement Matrix is an action tool. Each quadrant gives us an action depending on the situation. Proficiency (the ability to do something successfully) vs. Interest (a state of wanting to do something) places each of us, and our team members and stakeholders, into a quadrant. (See Exhibits 2 and 3.)

However, each of us has a different proficiency level in everything that we do. And at any given moment, our interest in doing something, learning something, or accomplishing a goal varies. Therefore, Proficiency vs. Interest is a very dynamic characteristic for an individual, for a team, for a group of stakeholders, and for each of us! Our interest ebbs and flows very dynamically. It was never truer that stakeholder analysis is a continuous effort.

Depending on where a person is on the matrix at any given time, *The Engagement Matrix* provides an action to follow. The specific action we take is context dependent. First, we must understand the nature of the stakeholder under analysis. Then, the action in each quadrant depends on the nature of the relationship. For example, a high P/I indicates a relationship that is to be nurtured. However, there are as many ways to nurture a relationship as there are relationships to be nurtured, so how we go about it varies!

It is said that people don't leave their jobs, they leave their manager. And one of the most often-cited reasons is a lack of appreciation. At the same time, managers avoid confrontation, put off performance management, and let problems fester.

This results in underperformance going uncorrected, which does not help anyone. A typical scenario is that we spend an inordinate amount of time and resources in the lower left.

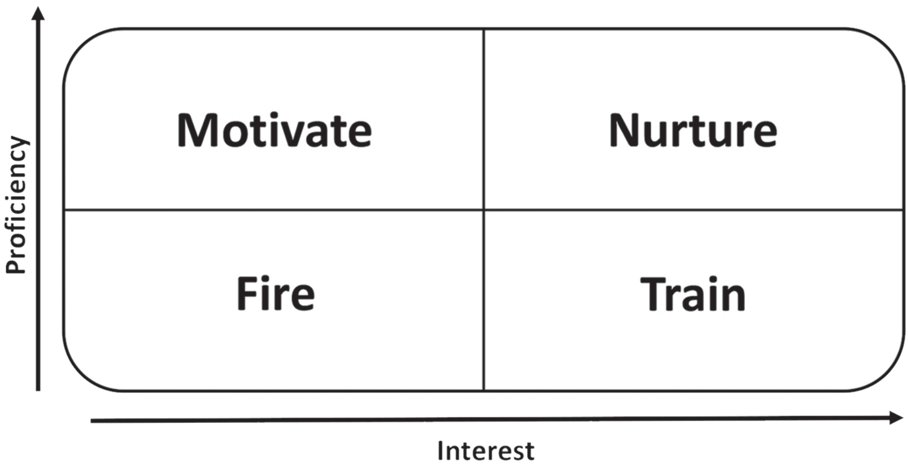

Exhibit 2: The Original Engagement Matrix

The *x* axis is for interest—a state of wanting to do something.

Where are we on this scale?

- How do we feel about coming to work?
- How do we feel on the way home?
- Are we satisfied with our results? Happy? Ecstatic?

The *y* axis represents proficiency—the ability to do something successfully.

How good are we at our jobs?

- What are our results?
- Are we meeting our goals?
- Are our stakeholders satisfied with our results? Happy? Ecstatic?

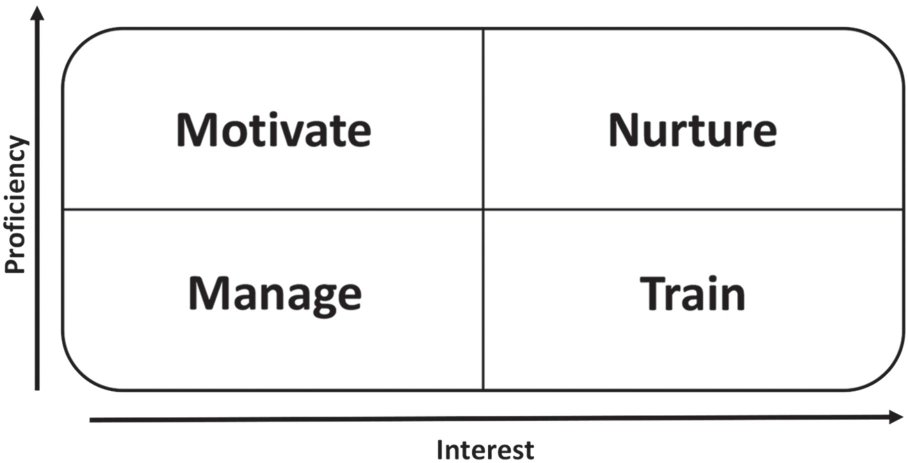

Exhibit 3: The Revised Engagement Matrix

We believe that firing as an immediate response is inappropriate. We've changed it to be the Manage Quadrant. Using Exhibit 3 as our assessment tool, we still may tend to spend too much time in the lower left. The first fundamental rule of using *The Engagement Matrix* is that a major responsibility is the engagement of the team. Focusing too much time on the lower left sends the wrong message back to the team. A person not producing at the expected rate and not interested in improving gets a lot of one-on-one time with management. Worse still, our super performers, those in the upper right (our 'go-to' people), are not getting the attention they deserve!

Let's compare this with how we take care of our automobiles. Some people service their vehicles on the recommended maintenance schedule, while others service (or more likely repair) on an as-needed basis, while yet others have a service schedule that is a mix of recommended maintenance and as-needed repairs. The decisions are based on the priorities of the moment. What needs to be fixed or maintained? What's the cost? What's the risk if it isn't done? What are the options? And what are the tradeoffs?

Now we can relate that scenario to leading our team. One-on-ones are maintenance for your most important asset: your team. When we're talking about a vehicle or any machine, including computers, the values of cost-benefit are usually tangible and readily calculable. However, when it comes to working with a team and with people, the measures are intangible and difficult to calculate.

The results in both cases are catastrophic at worst and expensive at best. In the case of the automobile, if you don't change the oil regularly, you may find yourself with a blown engine and in need of a new car. In the case of the team, if you don't perform the regular maintenance, you may find yourself in search of a new team!

The Engagement Matrix begins with placement in quadrants. We may be thinking about ourselves, a team member, or a stakeholder. Whatever the goal or the circumstances, we want to determine qualitatively the proficiency and interest levels. The location then determines an action, or at least suggests one.

The first level, the macroscopic level, is simply divided into quarters or quadrants. We like to call them quads. It is an extremely simple and effective tool. Quite simply, if a person is not very proficient at a task or, in a larger scope, not proficient enough at their job to meet the standards, then they score low on the y axis.

Now we have many questions, and we prioritize the one question that drives the remaining decisions. Is the individual interested in improving? The answer to this question determines the placement on the *x* axis.

The macroscopic quad level provides an excellent overview and can be used to guide immediate actions. However, there are other questions to be answered, and which question comes next depends on the placement in the matrix as well as the current circumstances and specific situations.

Each quadrant is divided into quadrants creating sixteen mini-quads. Each mini-quad then divides into sixty-four micro-quads. The micro-quads provide guidance. In some cases, they are direct actions; in other cases, they are guidance toward action.


Marketing
operations
Personality
Statistics
80%
Skill
28%
18%

Dimension 1: Performance Management

WHILE THE UPPER-RIGHT folks are performing at their very best and likely outperforming expectations, they are not being recognized or even thanked. According to many workplace surveys, gratitude is missing![1] The result is that our best performers move left into the demotivated quadrant. These are top performers who have lost their motivation to work for you! They were good hires in the first place, and you've invested in them. They were not only very good at what they do, they also learned how to get things done in your organization! Replacing them may cost thousands, not to mention the learning curve that your replacements will face while you are trying to lead your team to an exemplary performance level.

And this isn't even the bad news. The bad news is that they are probably not going to move across the country unless that's where the competition is. They're moving down the road, across town, nearby. Their greatest value is to your competitor, not because of trade secrets or any malicious or unethical intent but because inherent industry knowledge means they know the players, they know how things work, and they know how to get things done.

Therefore, we must be proactive. We must be aggressively proactive in managing performance in all areas of *The Engagement Matrix*. We should not restrict our use of *The Engagement Matrix* to our team. We should begin with our own self-assessment! If we find ourselves in the lower left, we must consider whether we can move to the upper right or not. Because if the answer is no, then we owe it to ourselves, to our team, and to our organization to do the right thing and make the change that enables us to live our lives in the upper right-hand quadrant.

People deserve to be highly motivated, and in fact most of us are! People do not wake up in the morning with their first thought being, *What can I do to bring the whole team down today?* We just don't think that way! You want to do a good job and so do your employees and team members. People intrinsically have a strong desire to be highly proficient. Perhaps one thing leads to another, and being highly proficient causes us to be more highly motivated. Maybe so, but we must start somewhere, and we usually can't start out at the peak of proficiency. We were not born with the innate ability to do whatever we do as well as we will ever do it. And this is good news! Because it means we can learn those skills and continue to improve indefinitely.

So, if we find ourselves in the lower left, it is our own responsibility to do something about it. Change can be scary, but not nearly as terrifying as living our lives in day-to-day misery, especially when it's within our own power to make a positive change.

And of course, the first step is realizing it. Understanding where we are on *The Engagement Matrix* can provide the guidance we need to improve our own situation. And once you've seen how it can work for you, it will be that much easier to use it as a tool to guide you in leading teams, managing departments, and collaborating with peers and colleagues, even those over whom you have no authority whatsoever.

Now, down in the very lower left, we would still end employment or at least remove the individual from the team, but at this point let's discuss what actually happens for many of us. We spend a lot of time down in that quadrant trying to work with people, to save them. We have to realize that anyone who has made the decision to stay to the far left of the interest axis has already mentally checked out of the organization. They are not engaged and not likely to become engaged. However, if they have a desire to engage but just can't, or haven't, for one reason or another, then perhaps we can address those reasons and help the person move to the right.

When we have an employee or team member down in the lower left, we must act quickly. To not do so is to jeopardize the happiness and productivity of the rest of the team, who are doing more than their share and not only not seeing any negative reaction to poor performance…they aren't seeing a whole lot of encouragement and support because we're too busy managing at the other end of the spectrum!

That's what leads to demotivating those in the upper right. To avoid this over-management of under-performers, we want to continuously assess and proactively manage—that is, do something for ourselves, our team, and our stakeholders—in each and every quadrant.

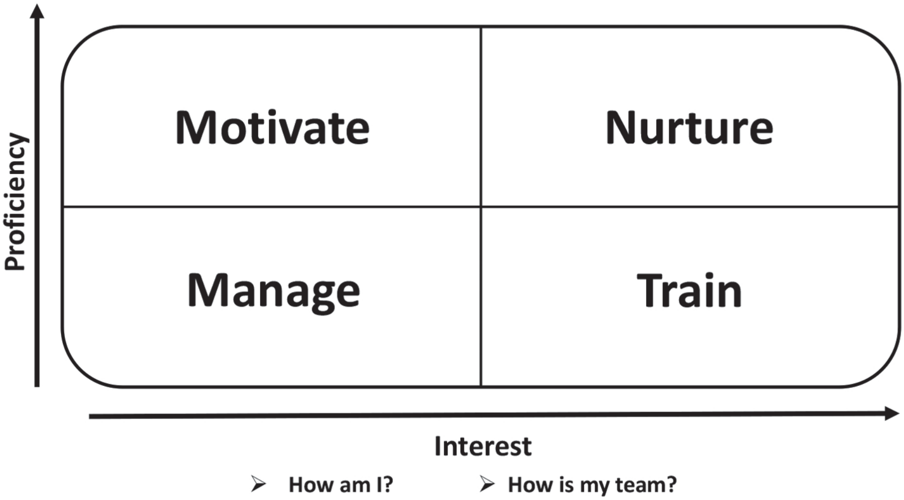

Exhibit 4: The Quad Level

To help with this, we have broken down *The Engagement Matrix* into actionable items, and we provide guidance in stages. The quad level, which is shown in Exhibit 4, is the macroscopic assessment level. Questions that we can ask are: how am I doing?, and, how is my team doing? This is a quick assessment that can be done at the group or individual level, and because it is very quick, it can be done weekly.

The mini-quad level provides four options for each quadrant. Shown in Exhibit 5, the sixteen mini-quads provide directional guidance for managing at a more detailed level. Assessments at this level may be done monthly for direct reports and team members and quarterly for stakeholders with whom close collaboration is required.

The Manage Quadrant

It is always a struggle deciding which quadrant to discuss first:

- Which quadrant is most important?
- Where do we start?

And to choose our starting point, we like to look at the end game:

- Where are we going?
- What is our goal?

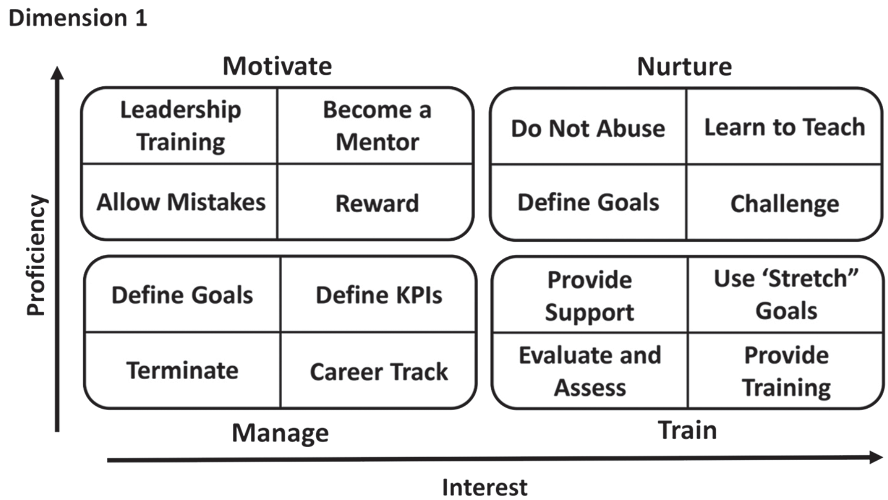

Exhibit 5: Dimension 1 Mini-Quads

Our goal in supplying a tool for ongoing informal performance management is to increase positivity in the workplace, resulting in a happier, more productive team that can effectively work through conflict and collaboratively find solutions to complex problems. Everyone on the team will experience less stress and more success as positivity builds on itself and the team realizes greater and greater achievements!

Frankly, we started with the lower left because we want to get it out of the way. Exhibit 6 shows the mini-quads for the Manage Quadrant of *The Engagement Matrix*. It is the lower left of Exhibit 3 broken down into mini-quads to provide direction and guidance for actions.

The Manage Mini-Quads

At this point, we need to ask, "Is the individual here by their choice?"

We do not want to spend our lives living in this quadrant, nor do we want our team members here. It tends to be thought of negatively and with good reason. However, we want to treat it with as much positive respect as possible. We want

Exhibit 6: Dimension 1 Manage Mini-Quads

our people to succeed, and we need to set them up for success. We certainly do need to manage in the lower left quadrant. In fact, if we have a need to manage in this quadrant, then we have a need to deal with it quickly and effectively simply because we do not want to spend most of our time here. Our goal is to lead people up and out of the manage quad.

The Manage Micro-Quads

Exhibit 7: Dimension 1 Manage Micro-Quads

Remember, it's about the team as much as it's about each individual on the team, and we want to set everyone up for success. We may or may not have the wherewithal, the actual authority, to end a person's employment. And even when we do, it's certainly a last resort. It's important to note here that we are not discussing termination for cause. That's a different situation and one in which you would be well-advised, if not required, to involve your human resources (HR) professional.

The Terminate Mini-Quads

Here we are talking about the termination of a person's position on your team. It is still a last resort and may involve transferring them to another area of the organization or a different project. But before you make that decision, it's important to ask, "Are you here by your own choice?"

This may seem like an odd question—does anyone choose to have low interest or have low ability? What we want to know is whether they have given up and have already mentally left the organization. If it is their choice to be in this quadrant, if they have decided that for whatever reason they have no hope of succeeding in this organization, then you have an obligation to the rest of your team to remove them from the team.

Think of it as if all of you are on a rowing team. How well would you do if a team member were rowing against the rhythm? What if they were not just a bit out of sync but doing absolutely nothing? Or worse, rowing in a different direction? It would be hard on everyone, and especially the individual who can't seem to get aligned with the team. Everything would be a struggle for them. Remember, we all have a strong desire to succeed![2]

So, we have an obligation to the individual and to the team to do the right thing. When the right thing is termination, then we must carry out that task as humanely and with as much respect, diplomacy, and tact as we can possibly muster.

The Terminate Micro-Quads

We mentioned that termination from the team is a last resort. Now let's take a look at the other options that come first. The micro-quads under Terminate provide guidance and direction to ensure fair treatment of employees while protecting the organization from unintended results.

Terminate

PIP	**Counseling**
Fairness	**Documentation**

Exhibit 8: Dimension 1 Terminate Micro-Quads

Fairness

It's important to work with your HR representative. They are expected to have the background, training, and experience to assist and possibly even guide or direct the action steps in a termination scenario. Equally important is that they are responsible for the safety and protection of the company itself and its employees.

Terminating someone's employment is a life-changing experience, for the employee and for you. We've often heard it said that it's just as hard on the manager as it is for the employee who is losing their job. We disagree. At the end of the day, you still have a job and they don't. There are two categories of involuntary termination: firing and laying off. Firing is easier. Don't get us wrong, we're not heartless. But people fire themselves. They know the rules. We have fired people for having inappropriate material on their computer, drinking on the job, taking drugs, stealing, and the list goes on. And there are things that should never happen in the workplace. You can use your imagination to fill in the specifics because if you can imagine it, it's probably been done.

And of course, laying off is very difficult because the person theoretically doesn't deserve it. If business conditions were improved, it most likely wouldn't be happening.

We are not talking about either of those here. We are talking about a team member who presumably has been performing at least at acceptable levels on either this team or another team in the organization, and now they are underperforming.

Removing someone from the team for underperformance is far more difficult because there is a shared responsibility. It isn't simply a matter of someone breaking the rules. Yes, their performance should have improved, or at least not declined. But what caused it? Doesn't the supervisor share responsibility for the performance of the members of the team? The answer is yes. We do share in that responsibility as leaders. The team member didn't start as an underperformer, so what happened?

No matter the reason for the termination, it is imperative, and probably mandated, for the HR department to get involved in the process. This is for everyone's protection—you, the company, and the employee. Your HR associates are trained and ready to advise in these situations, which are, at the very least, quite uncomfortable for everyone involved.

Back to the point, the hardest one to deal with, at least in our opinion, is having to let someone go because of underperformance. This is the situation where we need to effectively apply our leadership and management skills: leadership skills to help the individual as much as possible; and management skills to recognize and objectively measure the difference between acceptable performance levels and observed performance.

Ideally, the circumstances will allow the management of underperformance to be a gradual process. At some point, the motivation level must be determined to be positive. In other words, if a person is consistently underperforming and not interested in improving their performance, we must ask why:

- What are the consequences for underperformance?
- Are there rewards for excellence?
- Is it appreciated?
- Does the person have the skills and training necessary?
- Are the tasks clear and unambiguous?
- Are there personal reasons in the person's life?
- Are there changes in the performance level?

In the cases of consistent underperformance that we have observed, by the time the person was terminated, they were neither surprised nor upset. They knew it was coming. They knew the metrics, and they knew that they had not been met. In some cases, they didn't care. In the worst cases, people work for an organization and accept the salary without putting their heart into their work.

Often, underperformance management is not a gradual process. Dave has had people transferred into his department who had been consistently underperforming. This was the situation where the management action had determined that, in the best interest of the individual, the team, and the company, the employee should be moved to a different department.

Picture it. A beautiful sunny summer day on the Chesapeake Bay. A beautiful two-hour boat tour to picturesque St. Michaels, Maryland, where the team would be treated to the succulent rewards of tearing apart the indigenous blue crab accompanied by fresh, hot buttered corn on the cob, and there is plenty of Old Bay and beer on hand.

They took the team on a beautiful day cruise. The trip is a couple hours each way with lunch in between at a picturesque sea-faring port. On the way over, they had a meeting. During the meeting, it was asked if anyone would be interested in heading up a new group called sustaining engineering. It would be an exciting new experiment for the company, in that their culture was a leading-edge technology company in which most engineers wanted to work on the latest and greatest technology. Therefore, it was assumed that nobody would want to work in boring old sustaining engineering doing nothing but maintaining old products.

Dave volunteered to lead the department. And so, people were transferred into sustaining engineering. Now, when department managers were asked to sacrifice a couple of folks to sustaining engineering, who did they put forth? Many of them were already on performance improvement plans because they had been underperforming. It was the assumption that since they could not possibly have made any mistakes in hiring, onboarding, mentoring, or managing performance along the way, these employees were not cut out for the fast pace of research and development engineering.

But they would be a great fit in sustaining engineering where the technology was obsolete, or at least not cutting edge, and the products were already perfectly designed, in the field, documented, and manufactured.

None of this was true, of course. It was a very exciting time for sustaining engineering as they maintained a $95 million per year product line. The goal was to decline at a rate of 10 percent per year, but they ended up growing the bottom line because of the great enhancements that they made.

Getting back to the issue of transferring people into Dave's department, in some cases, they did well, in some they did not. He learned a great deal about managing performance during this stage of his career. He received some transfers to "help him out." Some did. Some he had to help out—of the company! In all cases, he made sure that he was being fair to the individuals, the team, and the company. And HR was an enormous help during this time. They helped him track progress, helped him understand how to have the difficult conversations, how to ensure that the individuals understood the challenges, metrics, consequences, and opportunities. And when some had to be terminated, human resources helped their transition with counseling, job search and resume assistance, and general guidance.

Ensure that no bias is entering this decision process.

We believe that we all have biases. We believe that all people have biases. They are learned; we aren't born with them. They are not genetic. That means that we can unlearn them. But to do that, we must recognize them. They can be positive or negative, and they can be obvious or extremely subtle.

No matter what the bias, and whether we are willing to work to lose them, we must be sure that they do not enter the decision process. This is one of the reasons it's important to document every step. One-on-one meetings, as well as more formal management processes, should be followed meticulously to ensure that everyone is treated equally and fairly and objectively.

Documentation

Ensure that legal requirements are satisfied.

This is another reason we must keep our files in order. People say you can't fire certain employees. You hear this all the time. It's often applied to government or union employees, but in the United States, we also have federal laws enforced by the US Equal Employment Opportunity Commission. These laws exist to protect individuals' rights to fair and equal treatment. The laws are not designed to protect people who steal from the company, and this includes stealing time. And isn't that what underperformance is all about?

When new employees are hired, they are, or should be, aware of the responsibilities and requirements of the job. They do not usually come in with the attitude of, "How can I get one over on this place?" They come in motivated and wanting to please their new management. When they are not meeting the minimum performance requirements, they must either try to improve or find a team on which they can find the motivation to perform. If they are intentionally not doing their best, then they are stealing. You must manage this situation. If you are the project manager and not their functional manager, then you must work with the latter to determine the appropriate action. Ignoring underperformance is not acceptable and will soon bring down the performance of the entire team.

Use clear and concise communication.

Are the words clear and concise? Words matter, so here are the definitions according to dictionary.com:

- Clear: (adjective) free from darkness, obscurity, or cloudiness; light[3]
- Concise: (adjective) expressing or covering much in few words; brief in form but comprehensive in scope; succinct; terse[4]

We are writing this book to be an informative, clear, and concise manuscript that is, at times, light and entertaining. Your project and managerial documentation do not need to be entertaining. That helps a lot with being more concise. When you're creating legal documentation, and that's exactly what your work communications are, you can edit easily. First, remove all the extra words. For example, the previous sentence would become: 'Remove the extra words' or even 'Remove extra words.' Bullet points help clean up documents with lists for things like expectations, consequences, timelines, etc. If you're using bullet points, use as few words as possible. If using complete sentences, use proper punctuation and remove most of the adjectives, even though they are awesome. So, an awesome adjective in a sentence simply becomes an adjective. And most of them are not needed.

Performance Improvement Plan

Be sure the Performance Improvement Plan (PIP) isn't a Performance Outplacement Plan (POP). Dave once had an employee transferred to him who was already on a PIP. But upon talking with the individual and reviewing the plan, it was clear that it was a POP. It demanded a performance level that this individual had not demonstrated in years. It was clear that there was no way that he was going to make it. It had to be proven to him first because he thought he could do it. He had been led to believe that. As it happened, the team needed a discrete piece of software developed, and it was not a critical path item. So, he was working on it. And working on it. And working on it. Week after week went by with progress but no visible results. It got to the point where this piece of software was on the critical path, and another software developer was offered a bonus to develop it within a few weeks. It was done in a matter of days. Now, the first employee was an experienced developer but just couldn't pull off this task. He went on to work at another company and did just fine. Perhaps he struggled in the corporate environment, in the software development field, or with the specific technology. We must also face the reality that most people do not leave the job, they leave their manager. Dave retroflected on his handling of the situation and learned from it. What he learned was to ensure that the PIP is not actually a POP. The plan should be an attainable and measurable journey to success, not a series of impossible hoops for the person to jump through just to be sure the legal check marks are ticked off before firing them.

Create reasonable goals.

Reasonable is a subjective word; what's reasonable to you may not be at all reasonable to me.

Let's go for a walk. How far? Well, let's be reasonable. You are an exerciser. A hiker. Maybe even a marathoner. Dave is a three-mile-a-dayer. On a good day. A very good day. So, what's a reasonable goal then? It must be one on which we agree.

We consider a goal for a team member to be reasonable when it meets certain conditions:

- You agree to it.
- It leads to success in an area for the organization.
- It leads to success for you.
- You will learn from it.

Remember, we are in the manage quad right now, and the reasons for goals evolve as the individual moves up and to the right in *The Engagement Matrix*.

Counseling

Collaborate with your HR representative. Even if you are a trained and experienced professional, when it comes to matters that impact people's lives in this way, it's good to have a second opinion. Firing a person involves legal and psychological issues that call for the right background and the people with the authority to approve the decisions that are made.

Determine what resources are available for the individual to help them succeed. Depending on the circumstances of employment, there may be help available for the individual. Most communities have assistance available. At the very least, we can point people to them for the help they need in getting their career back on track.

The Career Track Mini-Quads

Having a career track can be highly motivational and is often overlooked or missing in organizations. There are many different reasons that the career track may not be well understood by an individual. Some organizations do not have a formal career path or ladder for every employee. In smaller organizations, the process may simply not exist yet. To find out what the official view is, check your human resources or employment manual.

When no process exists, it may be beneficial for you to work with the individual and their manager, and/or human resources to develop a career path.

The Career Track Micro-Quads

Now let's take a look at the micro-quads under Career Track. The micro-quads give ideas and options for consideration when supervising or assisting team members who are developing or need to develop a career track. (See Exhibit 9.)

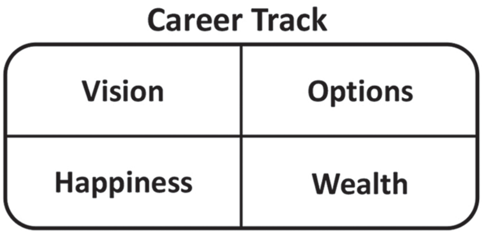

Exhibit 9: Dimension 1 Career Track Micro-Quads

Happiness

Set up recurring meetings to review career track.

Career coaching is dynamic as goals are achieved and priorities shift. Career coaching in the 'manage' quadrant has the dual purpose of helping the individual determine if this job is congruent with their career desires while helping you determine if the organizational needs are aligned with their career development objectives.

Review personal goals to ensure that career goals are aligned with personal desires.

A fulfilling career is an essential element in overall happiness.[5] A fulfilling career is one that provides much more than the basic living essentials. Compensation and benefits are an important part of it, but our careers need to also fulfill our life desires. Helping others, serving community, learning, growing in our profession, expanding our skill sets. We also have social needs that are often met through the workplace.

Wealth

Conduct due diligence to ensure that compensation is fair and equitable.

Wealth accumulation is an employee goal that we cannot ignore. We think money gets a bad name in management. The cost of employees is constantly rising, and we know that money is not a good long-term motivator. We hear it all the time. And while there is truth in this,[6] we must also recognize that if we have an employee who is concerned about money, it is going to impede their concentration and output.

Ensure that your organization's total compensation package is communicated. Help your team understand their total compensation package. We recently talked with a senior manager who asked her boss for an extra week of vacation in lieu of a raise. That is what is of value to her, and they readily (and wisely) agreed to it.

It is extremely important that compensation and benefits be fair and equitable, both internally and externally. But we must also remember all the benefits that a person gets. Of course, this is different for different organizations, so be sure you study the employee handbook and understand the benefits that are available. For example, your company may or may not provide tuition reimbursement, and there may be different conditions attached, such as a minimum grade requirement. But often, employees are unaware of these types of benefits and you, as their leader, can help them navigate the system to maximize their benefits. It will serve to help them and create a great employee! A win-win-win-win!!

Vision

Help your team understand opportunities and options. Short-term difficulties can cloud long-term vision. When a person is struggling in terms of performance, it can be difficult to look up from the problem that is right in front of them to see the opportunities that the longer-term perspective may provide. It is highly motivational for people to understand the opportunities that lie ahead.

Get to know people so that you understand their vision and can provide options that support the vision. Long-term vision will almost adjust as a person goes through life stages. There is so much talk these days of generational diversity, or intergenerational conflict, that sometimes it seems as though we forget that people pass through ages. We don't jump from generation to generation with a stepped pattern of change. Rather, life evolves, and there is a continuum of ages in the workplace. As a person goes through the various stages of life, their perspectives and needs and desires will evolve over time. Managing a person's performance requires us to empathize with their position in life.

Options

Discover and communicate career options. There are two reasons that we are going to be well-suited for this task. First, you are reading this because you are (or intend to be) in a leadership position. That means that you have experience and background, and you may have a view and perspective that is beyond what your employee has seen. It's as if they are walking along the floor of a forest and you have climbed a tree and can see what's all around you.

The other reason is that in your leadership position, you may have a broader view of the company itself and may be able to see opportunities that are not obvious. There always seem to be holes in job descriptions that create the situation where employees are hired to fill positions, but the work in the interstitial space between job descriptions falls through the existential cracks.

Ensure that people do not feel trapped in their positions. We believe that you will find that the happiest people in the workplace are the ones with some control over their own destiny. If a person feels trapped in a job, they are likely to resent it. We need to be alert for signs that this is happening because if they truly feel trapped, they are not likely to be overt about it. Trapped means they don't want to lose the job. However, they may perform at the minimum required level. They are not actively disengaged,[7] but they are not fully engaged either. It's like they're in neutral. We can help to re-engage them by making sure they are aware of and understand the opportunities as well as the consequences for continued underperformance. And yes, neutral is underperformance. The minimum required performance level is not the expectation. We are looking to build and maintain a high-performance team. That means a team of A players. That is not necessarily a team of individual high performers, but it is a team of A+ effort givers and a team of people who are good at what they do and are always looking to get better at it.

The Define Goals Mini-Quads

We are always working to manage our team up and out of the manage quad, so when an individual is in the lower left quadrant, working on goals with them will help both of you determine their desired direction. When they are enthusiastic about working toward goals that they see will help them move up and out of this quadrant, they are demonstrating the desirable work ethic that will help them get there.

The Define Goals Micro-Quads

Now we will explore the micro-quads under Define Goals. (See Exhibit 10.)

Exhibit 10: Dimension 1 Define Goals Micro-Quads

Positive

State goals in positive terms.

Receiving positive reinforcement releases a chemical in our brain called dopamine.[8] Dopamine is a chemical found naturally in the human body. It is a neurotransmitter, meaning it sends signals from the body to the brain. Dopamine increases our happiness. An absence of dopamine decreases our happiness.

We also know that happy people do better work.[9] A statement like "stop doing this…" can reduce the production of dopamine. We can rephrase that to, "I would like you to do this…." "Please stop being late for meetings" becomes "I would like you to be at meetings five minutes early so that when the meeting starts, you are ready to begin. I would like you to become the example of this, so that when people come to the meetings, they see that you and I are ready to begin the meeting." A 9:00 meeting actually begins at the stroke of 9:00 and not a second later. This behavior will spread. And of course, in order to accommodate this, we cannot have back-to-back meetings, and I will work with you on our schedule to avoid that situation.

Publicize

Determine how much publicity is appropriate. Publicity can help people achieve goals but must not humiliate. Publicity may be used under two conditions:

1. The individual or team under scrutiny agree to publicize.
2. It serves as positive motivation.

You want to ensure that it doesn't lead to negativity in the workplace or any kind of bullying or humiliation. Even undue competition within the workplace can be damaging. Yet one of the most popular techniques of project management—Agile—calls for public posting of project progress, risk, problems, and status. It is well-known to be very effective. Kanban is a process that is named after the

Japanese word for billboard. A Kanban board, whether physical or software-based, can be used to communicate progress dynamically and in real time. Many companies use Kanban[10] to post actual progress vs. goals, often inducing interdepartmental competition. It's all a matter of finding the right balance and techniques that work for you in your workplace.

Express goals in percentages in order to reduce negative competition. It may be as simple as a bar graph showing percentage of progress along the way to one hundred percent. You don't have to show absolute numbers in order to publicize goals. By using relative percentages, you can eliminate departmental anxiety associated with the individual goals, which should be individually focused.

SMART

Use SMART Objectives.

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

Specific means unambiguous. There must be only one outcome defined. One of the most common reasons delegations fail is that the result, while matching the instructions, does not meet the expectation. As Murphy[11] said, if there is more than one way of doing something, somebody will mess it up. Actually, Murphy's law is usually stated as, "If something can go wrong, it will." The premise of which is to make sure that nothing can go wrong or at least to exert the maximum possible effort toward that goal. In fact, the original statement that Murphy cast was about ambiguity, and the premise was not aimed at making sure that nothing can go wrong but toward the goal of ensuring that there was only one way to do something. An example is the various devices to ensure that there is only one way to plug a cord into an electrical outlet, with one conductor made larger than the other.

Help communication by breaking discussions down into SMART[12] objectives. Goals are at a higher level than objectives and often defined in more vague terms that are more difficult to describe in terms of specific actions. Communication between the delegator and delegate is made very clear through the SMART instrument.

State objectives in terms of the desired outcome and clarify as SMART. SMART may be an overused acronym, but in our opinion, it's an underused principle. In reality, it's a process. SMART is a whole instruction set for how to get things done through others. In this case, we are helping someone lift themselves up, and it's much easier to do so step-by-step, instead of looking at the goal as one giant leap. In the process of creating SMART objectives, we go through clarification. Simplification is another word for this. We try to shave off the ideas and activities that surround the core goal. Some of what gets shaved off will become additional goals and objectives, and while it's important to capture those in a parking lot, it is essential to get to the core goal—the one achievable next step. Because through the achievement of each single step will come the advancement toward the ultimate goals.

Collaborate

Work together with the individual to help them create their own goals.

We more easily and readily commit to those goals that we create for ourselves. So, when managing employees who are working out of the lower left quadrant, we need to encourage them to create goals they are excited about working toward.

Work together with surrounding stakeholders to ensure support for the individual.

As the leader, we often have a broader perspective than the individual employee. We are able to look ahead from our vantage point and see roadblocks, and we can also sometimes find ways around those roadblocks, helping to remove them before they impede progress. This can include having a confidential conversation with your frontline leader colleagues to try to be helpful, maybe even give a break, to someone who is struggling but trying to improve.

The Define Key Performance Indicators Mini-Quads

It's important to use key performance indicators (KPIs) as exactly that—indicators. They should not become the goals and yet should lead the individual in the direction of the goals that they are supporting.

The Define Key Performance Indicators Micro-Quads

Next, we will take a look at the micro-quads under KPIs. These will provide guidance and options for defining effective KPIs.

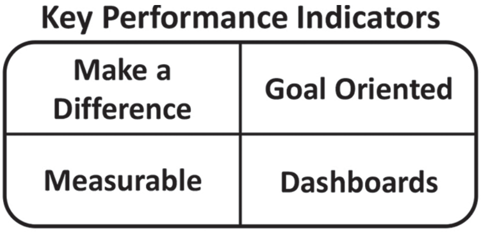

Exhibit 11: Dimension 1 Key Performance Indicators Micro-Quads

Measurable

Track progress using objective milestones. There are several ways that KPIs can become subjective or immeasurable. First, it could be subjective. Even the word 'done' needs to be defined. We've worked in many environments where there was done, done done, and done done done. The KPI may also be impossible. No mistakes. Zero errors. Zero bugs. One hundred percent complete. That's perfect! Humans cannot attain perfection. Accept it. And define reasonable goals and KPIs.

Create a tracking system for the KPIs. Tracking the KPIs should not become a project. Ideally, progress is reported automatically in real time. The odometer on your car does this. No additional work is required in order to know how many miles the vehicle has traveled. We don't have to log in to software, enter data, create reports—we simply look at our instrument panel. We may or may not have the means to do this in our workplace, but the closer we can get to it, the better. Look at the data that you already collect and determine if KPIs can be formulated using existing data.

Dashboards

Automate progress tracking. Progress tracking should be as automated as possible. Once we've figured out what data is available and what we're going to use, we can set up a project dashboard to display the results graphically. This can create a fun-to-look-at progress report that's easily understood and requires virtually no work on your part to update. The data is already entered as a part of the job, usually in the form of time reports.

Plan reporting up front, during the initiation stages of the project. A common mistake in project management is to think about reports at the end of the planning. Or worse, to not think about reports until reporting is needed. Thinking about reporting up front is similar to thinking about testing during project conceptualization. Over and over throughout Dave's career, he tried to involve representatives from manufacturing and quality in early concept discussions. And over and over, his management pushed against it because "it's too early to involve them," and "they'll be coming up with problems before we've even suggested what we're going to do."

Mainly due to office politics, there were times when Dave was unsuccessful in involving test engineering early in the project timeline and the results of those omissions were predictable. The testing team was not bought in to the project requirements or timelines, and that made things more difficult as the project work progressed and advanced. On the occasions when he was allowed to truly build an integrated team, including representatives from all parts of the company, they were much better at predicting problems and eliminating roadblocks before they occurred. In the case of testing, they were able to build tests to test the design and build product to pass the test. This is called test-driven development, a proven technique for building quality in.

Make a Difference

Create KPIs that incentivize by demonstrating forward progress.

KPIs must be taken seriously to be effective. Let's not put a bunch of tables and charts on the wall and ignore the consequences if goals are not met. Nor should we ignore the celebrations for the wins.

Create meaningful KPIs that do not create non-value-add work.

We certainly do not want to distract good people from doing good work by making them feed a chart monster. If working toward the KPIs does not lead us toward success, then the KPIs should be analyzed and either changed or removed.

Goal-Oriented

Create KPIs that directly create progress toward goals.

Remember that KPI means key performance indicator. It is nothing more than that, an indicator. It does not in itself propel you forward. An engine does that. Something that creates work. However, an indicator can be motivating. It can also be demotivating if progress is not as rapid as one hoped. We need to understand the difference and manage proactively and appropriately.

Create KPIs that are directional and will not become the goal itself.

Of course, when a goal is reached, a KPI will indicate this. However, the KPI itself must not become the goal. We don't want our people misdirected toward filling in a checkbox on a form when what is desired is honest-to-goodness improvement. We want an A team, and most people want to be a part of an A team. Being a part of an A team means always doing our best and constantly looking for ways to improve, both as a team member and as an individual performer.

Teams consist of individuals each doing their individual best. And still, we can have an outstanding performer who just doesn't fit in with a team. We don't necessarily need our team members to like one another. However, we do need them to respect one another. For there to be mutual respect, each team member must see that the other team members are trying their best and succeeding.

We are now in the upper right of the lower left, and we're using well-defined goals and objectives to help folks improve their performance and feel the benefits of success!

The Train Quadrant

Training is necessary for new hires all the way up to the most seasoned long-term employees. The rate of technology change is ever increasing, and people skills have become fundamentally important in every domain. Ongoing training is necessary to stay current and continuously hone our skills. When will we be the perfect communicator? At what point in our lives do we think we can't get any better at relationship building? We can always improve, and we need to provide our employees with interesting opportunities so that as their experience accumulates, they have engaging training available.

Training is applicable outside of the team as well. As project managers, we need to think about the engagement of all our stakeholders. Our stakeholder analysis[13] leads to a communications plan,[14] which will guide the type of communication needed. We need to communicate the right information at the right time to the right people. Too much, too little, or not the right people in project or organizational communications are a far too common cause of failure.[15]

We may have stakeholders who do not understand a development environment or a project management process. We may need to provide technical training on the product itself. We may want to use a project communications tool that requires stakeholders learn a new communications interface. We would advise against this in many cases, as we believe in accommodating what exists. For example, we have a client that uses Slack to communicate. We have another client using Google. We have clients using MS Project and others using Smartsheet®. Rather than trying to ask our clients to all shift to a tool and process that works for us, we conform to their tool. While you can say this is because of the nature of the client-provider relationship and we are a two-person company, we recommend this approach in all cases.

For example, if you are a project manager and you have multiple outside stakeholders, each with their own system, it would behoove you to learn their system and use it to communicate. We can set up awesome project management information systems, but if we need to constantly remind people to log in to see it, then they are not truly engaged.

The Train Mini-Quads

"The only thing worse than training your employees and having them leave is not training them and having them stay." —Henry Ford

Exhibit 12: Dimension 1 Train Mini-Quads

The Train Micro-Quads

"Training without practice is like reading a book with blank pages."
—Author unknown

The Evaluate and Assess Mini-Quads

While many organizations are passive about training, others provide training according to a pre-set agenda. While this can be useful in ensuring that everyone is up to date on legal, safety, and regulatory requirements, assessment can be a very useful tool in providing more job-specific training, especially management and leadership training.

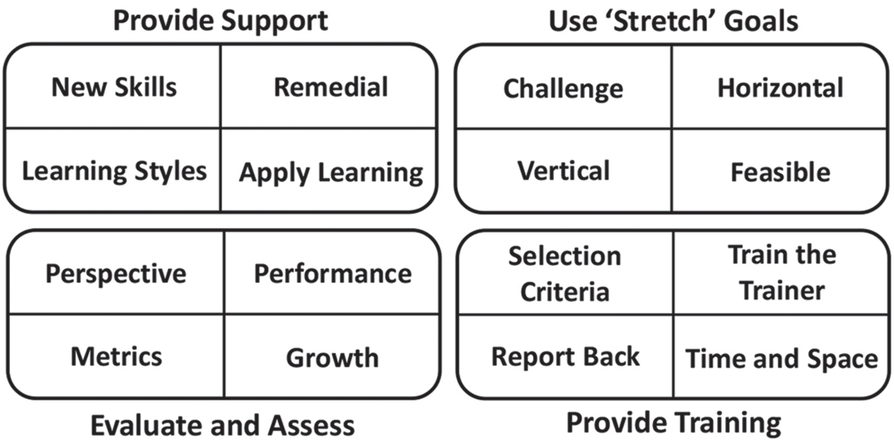

Exhibit 13: Dimension 1 Train Micro-Quads

The Evaluate and Assess Micro-Quads

Now we will take a look at the micro-quads under Evaluate and Assess

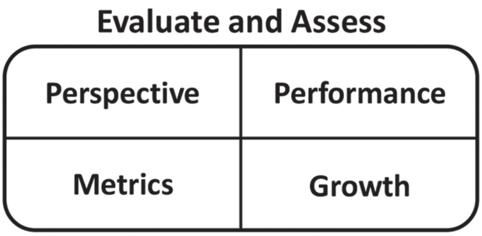

Exhibit 14: Dimension 1 Evaluate and Assess Micro-Quads

Metrics

Use objective metrics to determine individual training needs. It is sometimes difficult to determine what training will help the most at a given time. Cross that with training availability, and quality selection can become somewhat complex and time consuming.

Use organizational metrics to plan and predict future training needs. Training usually, not always, benefits the organization as well as the employee. We say 'not always' because there are companies that offer training benefits outside of a person's direct responsibilities with the company.

Growth

Support growth through training. There are many training options available. First, we need to ensure that people have the training they need to keep themselves and the company safe from harm and liability. Harm in terms of physical safety including the basics, such as fire drills, and emotional safety by ensuring not only that the boxes are checked for the basics, such as sensitivity and harassment, but also that the environment is truly inclusive and inviting.

Meet future organizational and project needs. Training can enhance future growth. A baseball team does not wait for the ball to be hit before they put people in the outfield. Nor should a company wait until the need for a skill is imminent before training up to what will be needed.

Perspective

Find opportunities for functional cross-training that will improve organizational collaboration.

How do you do that? Well, it seems obvious that if our people are cross-trained, it helps improve the organizational ability to optimize resources on projects. At the portfolio level, we need to manage shared resources, and this is clearly aided by having a cross-trained team. But there are even more valuable intangible benefits in areas such as morale and communication. Dave worked as a mechanical designer for many years. One of the elements he used was customized sheet metal fabrication. They sent their entire mechanical engineering team to work at a fabricator for a few days. They were apprentices for a week. The lessons they took away from there helped them create designs that were much more easily fabricated, saving them time, money, headaches, and grief. Communication became open and flawless in an environment that is often confrontational with the 'us versus them' mentality of engineering versus manufacturer.

Provide opportunities for crossover training to help build a team of generalizing specialists.[16]

As we develop our teams, we need to always think about the capability of the team. Where are people most likely to be able to help the team? A generalized specialist is not a jack-of-all-trades. Rather, they are a person with a deep expertise in a specific area and are also able to help the team in other, usually related, areas.

A multi-specialist, someone with deep skills in more than one area, can be extremely awesome to have on your team. However, we must understand the uniqueness of someone's abilities and understand those skills well enough to distinguish and backfill them. For example, a software developer can help automate testing. They don't have to design the test, but they can put their programming skills to work in automating testing that is already designed and proven. We are not looking to create a team of superstars where everyone can do everything. Rather, we are building a team that can work with one another to improve overall efficiency.

Performance

Design training to close performance gaps.

As you are determining what training to provide or recommend for your team members, there are likely to be several factors to consider. A team member may request specific training. Your team may need certain skills added, or it may be advantageous to the organization to train folks in certain areas. You will have to balance the wants and needs of the individual as well as the team and the organization. The decision factors may shift in weight depending on the circumstances. The best way to ensure that the optimal balance is achieved is to plan and develop a training program that considers input from all perspectives—organization, team, and individual.

Provide training in multiple formats, especially for repetitive training.

As trainers ourselves, we'd like to say, "Hire a training provider and stay with them." As with most things, there are pros and cons to doing so. Our favorite training schedule from a provider perspective is one in which we have multiple sessions with the attendees. This gives us the chance to get to know people and understand their environment, and at the same time, we are building a trusting relationship with them so that they become more open about sharing their challenges and what's unmistakably happening within the organization. Additionally, we can follow up in future sessions to see how they're doing with some of the changes they implemented as a result of prior sessions.

The Provide Training Mini-Quads

Many employers require a certain performance level for reimbursement to attend training. This will be a matter of finding the balance between the total compensation package and the level of benefits an organization chooses to provide.

The Provide Training Micro-Quads

Now let's take a look at the micro-quads under Provide Training.

Provide Training

Selection Criteria	Train the Trainer
Report Back	Time and Space

Exhibit 15: Dimension 1
Provide Training Micro-Quads

Report Back

Require training attendees to report back to the organization to share the knowledge.

There is an ancient Chinese proverb that says, "Tell me and I forget, teach me and I may remember, involve me and I learn." Research shows[17] that students will forget things very quickly. In fact, as little as 50 percent retention within one hour is cited by one source.[18] One method to help people remember is called spaced learning. Spaced learning[19] is a concept that is designed specifically to overcome the forgetting curve. In spaced learning the content is highly condensed and repeated in specific patterns with breaks and distractor activities between the sessions.

The idea is to involve people in the content so that the learning is embedded in long-term memory. We can incorporate the principles of spaced learning by having recurring training sessions on a monthly or quarterly basis. This can be further enhanced with practical assignments completed by the attendees between sessions and returning to the topics for further discussion.

A great way to gain maximum benefit from training is to ask your team members to share their training experience with the team. This helps in many ways:

- Optimizing the training benefit to the organization
- Helping the person hone their presentation skills
- Evaluating the training provider and compare experiences among different attendees

- Knowing that you will present the material helps a person focus when in class
- Preparing to present helps the person understand and remember the material
- Providing feedback data on training providers to human resources to help improve the experience and value for the organization

There should be a standard form for all training attendees to fill out and submit to human resources and to management. There are several factors to be considered when selecting a training provider, such as cost, capability, expertise, and so on, but the most important factor to consider is whether the attendees will respect and learn from the provider. The provider should be a subject matter expert in the area in which they are training as well as be a certified and experienced trainer. The former is important for the trainer to be able to provide depth and breadth of experience when answering questions, and the latter is critical to being able to effectively deliver the material and engage the audience.

Time and Space

Ensure that the environment is conducive to learning.

The office is a terrible place to hold training. We repeat: TERRIBLE! We're not talking here about the physical space. Some companies have incredible training centers and conference rooms with all the fixings – teleconferencing, kitchen area, plasma screens with wireless connections, flawless high-speed internet, comfy chairs – you name it! And yet none of that makes up for the interruptions and angst that comes from being near the action and knowing that you are missing meetings and conversations and feeling like you are slipping behind with each passing moment.

We find that for people to be truly engaged in the workshop or seminar, it is extremely helpful, we would say necessary, to be away from the office.

Help attendees manage their schedule to minimize interruptions.

Time management is a matter of prioritization. When our team members are going to be out for any reason, including training, we should work with them to ensure that their calendar is clear. Time and time again, we have attendees who are distracted by work issues, which clearly inhibits their ability to immerse themselves in the learning.

Enabling unimpeded learning for our team members may be a challenge due to resistance from the organization itself. There are many underlying factors, the most obvious of which is that if the employee is in the office, they are available for brief interruptions or even to break out of the training if needed. And of course, they will be needed!

The price we pay is that the training itself is wasted for the individual who cannot concentrate, and it may have a negative impact on other attendees. For example, if there are group activities and a team member is removed in the middle of an exercise, the remaining team is prioritized on filling the gap, which detracts from their ability to concentrate on the task at hand and the intended lessons.

Selection Criteria

Create selection criteria prior to choosing a training provider.

A training provider should be selected carefully through a process just like any other vendor. However, even more care should be taken with a training provider because they are going to fill several roles for you. A good training provider will conduct due diligence on your organization to ensure first that they and you are a good fit for one another. It's important to remember that they are going to work with your most precious asset, your people. Without your people, you have no organization. Your people make it work. Your people represent you to the outside world, to all your stakeholders, and to your clients and customers. Training them is of the utmost importance, so the selection of a training provider should be done with care!

Ensure that providers are qualified, current, and engaging.

In the project management industry, one way to ensure that you are hiring a qualified trainer is to use a PMI Authorized Training Partner. This way you know they have been vetted by the world's largest organization in the area of project management.[20] Whatever your industry, we implore you to be sure that your trainers are qualified, current, and engaging.

Train the Trainer

You may have folks with hidden training talent, and this may be an opportunity for them. Dave learned that he liked to conduct training after attending leadership training. He had known the instructors for several years (they were HR folks), but he had never seen them in the role of instructor or training facilitator. They were great! He wanted to give it a try, and the company allowed it. He attended train-the-trainer training and found that he was enjoying himself while conducting the leadership training.

Learning to facilitate the training helped Dave improve his presentation and social (interpersonal communications) skills, and it also helped him learn and understand the material. If you want to learn a topic deeply, one way to do so is to commit yourself to presenting or teaching a course on it.

Use your employees to reduce the overall cost of training your organization. Clearly, having your people conduct the training is less expensive than hiring an outside training company. Right? Maybe! When weighing the pros and cons, we must consider not only the direct cost of the employee, but the intangible cost of the time it takes to prepare and deliver the material.

The Provide Support Mini-Quads

Providing support for training involves more than letting your employees sign up for a workshop and then paying for them to attend. Our experience is that more than half of workshop attendees are focused on work-related issues during the workshop, and many report that this directly interferes with their ability to derive value from the training.

The Provide Support Micro-Quads

Now let's take a look at the micro-quads under Provide Support.

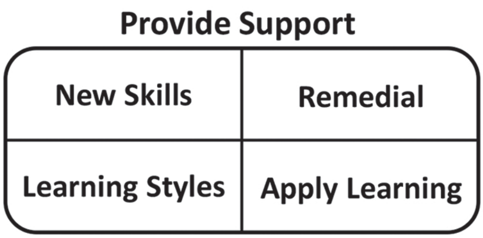

Exhibit 16: Dimension 1
Provide Support Micro-Quads

Learning Styles

Encourage employees to self-assess their learning styles.[21]

Helping employees understand their own learning style can greatly enhance the educational experience. Some people will do better with online learning than others, so understanding learning styles can help with the training selection process.

On an individual basis, it can be useful for an individual to understand how and why they learn best. Choosing the right training for the right person can have a very positive impact on the outcome.

Engage providers that address all learning styles.

A good training provider will understand and address all learning styles. They will understand that to reach all people, we need to engage all the senses. Look for a lot of participative activities and multi-media presentations.

Apply Learning

Prior to training, create goals that will require the training to accomplish. Wow, now that's a mouthful! But yes, actually do it. Create goals for the trainee that they will need the training to complete. We find that training is more effective when attendees have a specific problem to solve.

Allow ample learning curve opportunity in the application of new skills. New skills require practice time in order to hone and perfect. Don't expect your team to come back and be immediately expertly proficient with new skills. Remember that they are on a learning curve. Perhaps begin with an assessment in quantifiable, measurable terms of the current proficiency. From there, you can create metrics and target dates to step proficiency up to desired levels.

New Skills

Apply new skills to lower risk projects and tasks. When the team is experiencing project or deadline pressure, it is not the best time for training and new techniques. Experimentation is much more welcome in a low-pressure environment, so we need to pick those times when we can afford a higher risk tolerance to apply new processes or techniques. When the pressure is on, we want to be able to rely on proven techniques and processes to get things done. Obvious exceptions are made when necessitated by business needs. In other words, if we are under pressure and what we are doing is not working or getting the results we need, then we should probably try something different. However, if we develop an environment of high-performance and continuous learning, then we will be experimenting and optimizing processes during non-peak times. This will hopefully reduce the number of avoidable disasters, leaving time and bandwidth to deal with any unavoidable and unpredictable risks that may materialize.

Document progress with new skills through informal one-on-ones. We want to keep people moving forward with a continuous improvement mindset. This requires that we meet on a regular basis; we recommend every week or every other week. These meetings are important to the communication process. You will find that missing them feels like riding a boat into rough waters.

Remedial

Using new skills may uncover need for additional coaching. When the reason for training has been coaching, either for behavioral or performance issues, it is entirely possible that issues that have been masked may now be uncovered. For example, you may have an employee who needed training in presenting material. They need to be able to conduct effective design review meetings. Now that they have received training, they understand how to be a more effective and engaging speaker, but they need additional training in software.

One example from Dave's background is in the area of mechanical design using CAD software. The designs required blended curves and intersections that were very difficult to create in software. On a drawing it would be called out as a note: "blended radii not to exceed x." But in CAD, the real geometry needed to be created. There was to be no drawing, no notes. The CAD file itself would be used by a numerically controlled machining center to create the mold for the parts. Training was needed but not only training. The software needed to be upgraded. The hardware needed to be upgraded to support the new software. The expense was masked by the fact that the software had not been being used to its full potential.

Reinforce best practice application through ongoing training. Best practices evolve as technology and knowledge evolve and grow. Ongoing training is necessary to keep fresh ideas flowing in your organization.

The Use Stretch Goals Mini-Quads

One of the more common reasons for people to leave their jobs is boredom.[22] We can use stretch goals to help our team reach new horizons and help team members achieve their individual goals. Stretch goals are goals that cause us to make an effort to reach beyond what is easily within our grasp, to stretch our abilities and to challenge ourselves.

The Use Stretch Goals Micro-Quads

Now we will review the micro-quads under Use Stretch Goals.

Exhibit 17: Dimension 1 Use Stretch Goals Micro-Quads

Vertical

Create upwardly mobile stretch goals.

A vertical stretch[23] will help a person climb a career ladder. Remember that upward mobility does not necessarily mean a management track. Some people want to be leaders, others do not. At this point, it is not our job to determine who will or will not make a good leader or manager. It is very difficult to determine that ahead of time. If the desire is there, then the training is likely to give them the tools they need, and from that point forward, it's a matter of practice. Just as it is for all of us.

Create stretch goals that reach beyond the current paradigm.

A stretch goal can be vertically diagonal if it is upward and outside the current field of expertise.[24] This may sound unusual, but it can be extremely motivating for an individual, which will almost always benefit the organization. While some people may take advantage, we don't think that's a reason to not consider it. It is not uncommon for people to have two or more very different careers. Supporting individuals as they pursue their dreams is mutually beneficial. It is motivational for a person to be able to openly pursue education or training while continuing to serve the organization in their current role.

Feasible

Create challenges that are achievable and do not inappropriately increase personal risk.

Challenges will be neutralized and become demotivational if not achievable. Create challenges that account for reality in terms of time and effort. Again, if the time and resources are simply not available to realize success in a challenge, then the challenge itself is neutralized, the process takes a hit, and you lose some leadership points.

Challenge

Work together with the individual to develop challenges.

The individual must be willing to accept the challenge and truly internalize it. Define the challenge to support the learning goals. The challenge itself or reaching the result of the challenge may not be the actual purpose of the challenge. The learning goals may be reached through the process of executing the challenge, not necessarily the result of the activity itself.

Horizontal

Assign challenges to improve interdepartmental communication and collaboration.

When considering horizontal challenges, we may look across the organization to determine if there are areas where collaboration and cross-pollination make sense.

Assign tasks to help project managers and potential project managers understand roadblocks.

Assigning tasks that are outside of the normal purview for a person can genuinely expand their horizons. It can be very helpful to understand things from other perspectives. Often, we are able to eliminate roadblocks for other people by understanding their perspective and making sure they have what they need when passing work products or information.

The Motivate Quadrant

"So much of what we call management consists in making it difficult for people to work." —Peter Drucker

Although it's been over fifteen years since Peter Drucker[25] could share his wisdom personally, this observation holds true today. We believe that the need for motivation in the workplace is often overstated. Instead, what we need is an absence of demotivation.

The Motivate Mini-Quads

Motivate

Leadership Training	**Become a Mentor**
Allow Mistakes	**Reward**

Exhibit 18: Dimension 1 Motivate Mini-Quads

Focus on not demotivating your team!

Daniel Pink is the first name that we think of when people ask us about motivation. His bestselling book *Drive: The Surprising Truth About What Motivates Us* is the book to read if you want to honestly learn about motivation. Daniel Pink has several other books available as well, with, at last count, four New York Times Bestsellers! He also happens to be a nice guy. We've seen him at several events, and we bugged him before and after his talks for autographs and advice. He's very generous with his time and even offered advice on how to write a book!

Anyway, back to motivation. And by the way, all it takes to write a book, it turns out, is the motivation to actually do it. If you want to produce written material, you must write! And think about how much easier that is now than a hundred years ago when we would have had to use a typewriter and carbon paper. The physical process itself was challenging. Now the computer is filling in the remainder of our...well...nobody is perfect. Not even computers. Yet.

During our thirteen years of teaching together, whenever we've talked about motivation, we ask the class if there are any marathon runners. Perhaps surprisingly, even in classes with very few attendees, we rarely have a class where nobody has run a marathon or a half-marathon. And when they admit they've done it, we say, "Wow! So, for no good reason you ran twenty-six [or thirteen] miles?" Without fail they correct us: a marathon is 26.2 miles; and a half-marathon is 13.1 miles. We have asked the question in every presentation and workshop in which motivation was a topic, and we can assure you that a marathon is 26.2 and a half is 13.1. Not twenty-six and thirteen. The conversation usually goes like this:

> Dave: Has anyone here ever run a marathon? *(Hopefully at least one hand goes up. We have only had one time where no hands went up...and that made it a bit difficult. Sometimes, you gotta dance.)*
>
> Dave: So, you ran a marathon? Twenty-six miles? *(Or thirteen if they were a half-marathoner...which is still about ten miles further than Dave can run, or walk.)*
>
> The marathoner: Twenty-six POINT TWO *(or point one if it was a half-marathon)*
>
> Dave smiles and says: So, that point two is important. I mean, even I can run point two miles. How important could it be? Of course, I would have a very hard time running point two miles if I had just run twenty-six.
>
> The marathoner always responds: Yes, it *is* important. If you only run twenty-six, then you have not run the marathon.
>
> Dave: So then, if I was standing at the end of mile twenty-six, where you can literally see the finish flag...if I were standing there and offered you one hundred dollars to not finish, would you take it?

They say 'no' and then Dave starts going up. He usually stops in the low thousands. He used to go even higher, but he just can't believe someone if they say they'd turn down one hundred thousand dollars or more.

The lowest amount of money anyone in any class has ever stopped for is five hundred dollars. So as Pink points out, our actions at work are not consistent with what we know to be true. Pink shows scientific evidence, and we've done our own experimenting over the past ten years.

We all have this inner drive. The drive to succeed. The drive to finish. The drive to do a truly great job. So, in the marathon example, a person who is doing something only for their own satisfaction would be self-motivated to finish, and money would not sway them. We could not even pay them to stop!

Yet in the workplace, where we are already paying a person to do a job, we think we have to pay them even more—a bonus—to do a better job or to get it done faster. This can create quite a paradox. Let's think about a project that is estimated at twenty weeks (about four and a half months) for the team. We offer incentive bonuses to finish by week fifteen. If you finish by week fifteen, you get a large bonus. You dream of new cars and a boat. If you finish by week seventeen, you get a smaller but still substantial bonus. This one is probably going toward debt or savings. Of course, part of the larger one would have to, but it was so big that you didn't even think about it. There was enough for savings, debt, and a boat. Now the boat is sunk, and you're under pressure to get this project finished.

If you finish on time, you get the original agreement. Having missed two bonus milestones, the general consensus is that the project is late. You may believe it's going to be late. The team members feel that it is late because they didn't get their bonuses either, and management was planning on the release at the time of the first bonus. They actually thought the impossible could be achieved through incentives. The impossible cannot be achieved. Seriously, it can't.

And what if the project is late? As the project progresses, and these early milestone dates are missed, the team becomes progressively less motivated!

People don't come to work hoping to fail. They start new jobs full of hope and enthusiasm and goals and dreams. Many start a new week this way, or a new year, or even a new day! Mondays are not always looked upon with gloom and doom. And in fact, if someone on your team consistently dreads Monday, it's time to find out why! The mini- and micro-quads provide guidance and actions.

The Motivate Micro-Quads

Exhibit 19: Dimension 1 Motivate Micro-Quads

The Allow Mistakes Mini-Quads

Be proactively non-demotivational.

We don't mean that you should allow people to fail. Nor can we allow our project to fail. We certainly wouldn't intentionally allow people to get hurt (physically or emotionally), and we would definitely take necessary actions to prevent mistakes from having a negative impact on the organization. We also don't mean it's okay for people to mess up all the time. Repeated mistakes, messing up the same thing over and over, is an indication of a problem. It may be that a process is broken or that someone doesn't understand what needs to be done or is simply incapable of accomplishing the task. Whatever the cause, repeated errors are a performance issue that must be addressed.

So, what do we mean when we say, "allow mistakes?" We mean that we want to encourage exploration. When we do that, mistakes are likely to occur. Edison said, "I didn't fail 10,000 times. The light bulb was an invention with 10,000 steps."[26] He also said, "Great success is built on failure, frustration, even catastrophe."

So we have to define what we mean when we use the word 'mistake'. Oversights and other errors are part of being a human being. All people make mistakes. Some of us are more prone to errors in our work than others. There may be reasons for this that we can address. What is happening when a person errs? What were they working on? Were they engaged or working on something that was boring to them? Were they interrupted? Is it unusual for them to err in this way? The answers to these questions will lead to possibilities for correction in process. Let's not look for who did something or why someone did something. Instead, let's look at what was happening at the time and what in the process may be changed to enhance the process.

Continuous improvement has been the rallying cry for project managers for decades now. Whether we're agile or waterfall, engineers, scientists, technicians, or lawyers, regardless of the industry we're in, we're all constantly trying to find better ways of doing things. Efficiency improvements have a direct impact on profitability as well as employee morale.[27] The better we are at something, the more productive a team is, the more motivated they are to do even better. However, directly addressing efficiency in order to achieve better results is the antithesis of great leadership. Focusing on the people themselves, enabling them to achieve greatness, is the leadership technique that we embrace.

Continuous improvement without mistakes is very difficult. When people are afraid to experiment with a process, progress is impeded. Controlled experimentation is sometimes required. Safety needs, or the regulatory environment, are examples of constraints that may necessitate controlled experimentation.

There is risk associated with allowing mistakes, so we should understand those risks and do what we can to push the envelopes of creativity while managing the exposure to the organization and to all stakeholders, including our team.

The Allow Mistakes Micro-Quads

Next, we will take a look at the micro-quads under Allow Mistakes

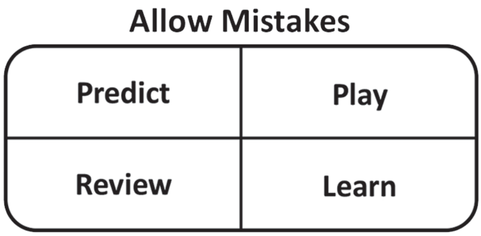

Exhibit 20: Dimension 1 Allow Mistakes Micro-Quads

Review

Use the Plan-Do-Check-Act (PDCA) cycle.

The PDCA cycle[28] gives us a method for allowing mistakes without failure. We want things to go wrong because we learn the most when things don't work. Do we? Let's look at it another way. If something is being done wrong but the results are acceptable, is this good or bad? It is good if the "wrong" way is a new and better way. But what if the wrong way is indeed wrong? Then the positive results must not be a result of the process but of something else. The environment? The circumstance? There is not always a cause and effect.

A friend gave us a great example of the lack of cause and effect. He said, "Every night when I leave the office, I shut off the light. When I come in the next morning, the trash pail is empty. Therefore, shutting off the light causes the trash to be emptied."

Here is a workplace example. Dave worked for a company that was doing extremely well. The management, however, was unstable. They were in conflict and competition with one another. Decisions would be made and then reversed and then remade. Reorganizations were common as people were shuffled around from team to team.

Many of the decisions had the team thinking that if the economy or the market ever turned, and they were no longer drowning in cash, this management team would be overwhelmed. And surely enough, that is what happened. The market turned downward and, after hundreds of layoffs, the company filed for bankruptcy and was eventually sold and became a division of a competitor. Eat or be eaten.

Is our process working well? Do not be fooled by false positive results.

Things may be going okay, but okay is not good enough. Things can never be going well enough that we want to stop evaluating our process. PDCA. When things go wrong, we can use the process flowchart to evaluate our next step:

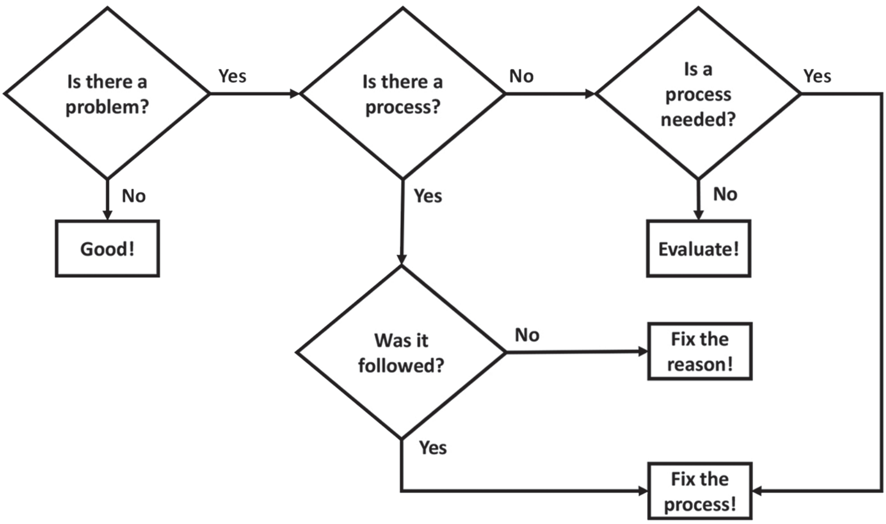

Exhibit 21: Process Flowchart

Learn

Document and communicate lessons learned and create SMART[29] actions for changes to be integrated into process. Learning in Dimension 1 means self-learning as well as helping our key stakeholders, especially our teams and our employees, learn and grow. Mastery is a key to motivation, according to Pink,[30] and learning is a key to mastery.

One of the fundamentals of self-study for difficult examinations is to prepare by taking practice exams and looking up the correct answers for the problems the student got wrong. Naturally, it is helpful to understand the context of your correct answers as well, but most of us being limited in the availability of study time (or the prioritization of it), are going to limit ourselves to only looking up the answers to the questions we get wrong. Bill Gates[31] said that we learn the most from our failures.

There are many ways that we can use our allocated team budgets to facilitate learning. If you are the team leader of an agile team that is working in iterations (called sprints in scrum), then you need to account for time that is not going to be directly value-add or development time. You need planning time, review time, retrospective time, and importantly, refactoring time. One model for this is to operate in two-week sprints. During the two weeks you can minimize the number of interruptions and meetings for the first eight days. Sprint week number 1 Monday thru Friday is development time. There may be a few meetings, and there will be daily standups, but most communication is expected to be done in a more informal way. The team will learn to communicate and collaborate as a team.

The Thursday of week number 2 can be used for retrospection, reviewing, and planning. And we suggest doing them in that order. A new team may need more time for each meeting (ceremony), but once a team is operating in a high-performance mode, it is possible to get all three of these done in less than one day. This leaves the remainder of Thursday and all-day Friday for refactoring and other work that is not directly related to the project development.

This gives the team time to breathe and think. A break from the focus optimizes the team for work to begin the next iteration on the following Monday. Allowing refactoring time (in fact, mandating refactoring) reduces the level of technical debt, thus facilitating the advancement of longer-term objectives, such as reuse and maintainability of a developed product. This is true whether the product is software-based or a mechanical product that is modularized for future options. We all find ways to apply learning within our organizations and with our teams.

Another example would be a project manager who is managing a traditional (waterfall) project development schedule. By definition, a Gantt chart schedule has at least one critical path. Determining the critical and near critical paths enables one to understand the non-critical paths. That is, those paths that contain float or slack.

In a matrix organization,[32] the “free” time that is created by the float in a schedule is often occupied by the individual’s functional manager. There are needs and meetings outside the project team.

This may or may not be the optimal resource allocation model. The float time may create opportunities for the project manager to move resources between tasks in order to optimize the schedule. Additionally, it is important to remember that once the resource is “given away,” they are not available for needs that may arise out of changes in the project schedule. How sensitive is your project schedule to changes? On one hand, we cannot have people just sitting around waiting for assignments. On the other hand, if a resource is assigned to our project full-time, they should be available to the project team full-time!

Another possibility is that we can use the slack in the schedule to accommodate learning! We may be able to provide mentoring or coaching opportunities or even training events. There could be opportunities for a team member to do research on a topic and then share that learning with the team. There are as many opportunities to help people grow as there are ways to enact them. If learning is a priority, it will show in your actions.

Predict

Predict and manage results of experimentation, and account for risks, options, and alternatives.

This includes experimentation with process. Don’t be afraid to try new leadership techniques with your teams. Be careful though! People don’t change overnight, and they may not appreciate the change at all. Getting buy-in from your team means involving them in the process. Ask them what changes they’d like to make. Your training as a leader means that you are able to offer alternatives and options of which they may not be aware. You may also have a view of risks or challenges that they had not considered.

Do not make the decisions for them. Instead, offer them the alternatives and let them decide what we should try next. Maybe some of your team wants to try replacing the fifteen-minute daily standups with a meeting twice per week? Should we try it? What will we lose? What will we gain? This will also help you prepare for the risks. Whether you make the change or not, there is great value in the conversation. If the risk is great, then maybe the pilot period is shortened.

Offer alternatives and facilitate meetings in which your teams are encouraged to offer alternatives. Then predict the results of the change or experiment, compare your results with your expectations, discuss, share learnings, and move forward.

Play

Define the limits of play and give play time.[33]

Play means non-work. At least, that's what we mean by play. So, that means that we are paying people to do whatever they want, within limits. You may apply a goal to it, which means that they aren't doing just anything but trying to produce something without following a mandated process. True play means no goal. It's literally doing something that is not work. Why provide time for people to play? Isn't that what non-work time is for?

Yes, to a certain degree, that is true. We get paid to work. Or, more precisely, most of us are paid to produce results. The more freedom people have to do the work in a way that is pleasing to them, the better the results.[34]

It is also true that we need time to percolate our ideas.[35] So a person may take five- or ten-minute walk around the building. That has become common, so we wouldn't question it. But some folks might do better by working on a puzzle, coloring, or playing with Play-Doh for five or ten minutes. These things may look out of place in the workplace but could be just the mental break that someone needs to keep going with a task.

In the remote environment, we can do things that help us relax without anyone knowing what we're doing. Maybe that's one reason why, for many of us, working remotely seems to be a more productive environment than working onsite.

The Reward Mini-Quads

Einstein[36] said, "Imagination is more important than knowledge. For knowledge is limited to all we now know and understand, while imagination embraces the entire world, and all there ever will be to know and understand."

It is important to reward positive behavior, not only positive results. People notice. If it's not okay to take chances, if people get in trouble for "wasting time," then people will find other outlets for their creativity, and you will lose the benefit of their imaginations.

The Reward Micro-Quads

Now let's take a look at the micro-quads under Reward.

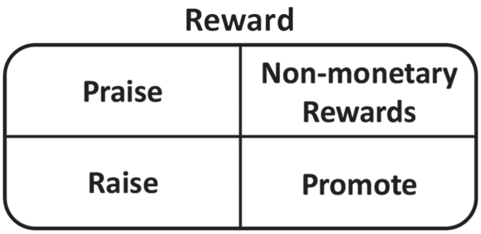

Exhibit 22: Dimension 1 Reward Micro-Quads

Raise

Compensation and benefits should be determined together with HR in order to promote a fair and equitable work environment. The action for the frontline leader is to document work performance and be ready with a full set of data as input to the employee's performance evaluation. This means that whether we are directly or indirectly responsible for input into a person's performance evaluation, it is important to remember that this is quite possibly the most important document in their life, or at least in their work life.

You can make a real difference by the way you manage performance evaluations. The fundamental rule is that there should be no surprises, especially for the employee. Performance feedback should be given when it is needed and when it is deserved, not when it is convenient to the supervisor or required by HR organizations. When it comes to financial matters, it is a matter of hygiene more than motivation, referring to Herzberg's motivational theory.[37] While we may or may not have direct input into the amount of compensation an individual receives, it is our responsibility to report their performance in a fair and equitable manner to those who are making those financial determinations. They should be provided with a holistic picture of the person's performance.

Promote

Promotion is a reward for achieving a consistent level of performance, and task assignments may be allocated to help people move to a new level of performance. Through task assignments that are challenging and motivating, we directly influence and enable growth and mastery. We may also have opportunities to recommend people for promotion when we recognize that they have attained a new level of achievement. Promotion to a new title or pay grade generally means that a person has attained the minimum requirements for that level. They can do the job at an entry level for that job. A mistake that some leaders make is having people on the teams in a certain pay grade, say, mid-level developer, and they are very good at their job. They've gained experience and are well along the road to senior. We cannot and we must not apply an expectation of that same performance level in an associate or junior developer who may possibly be ready for a mid-level position and deserve a promotion.

It's important to remember that a promotion to a pay grade should be performance and skill based. The compensation (including salary and benefits) should be commensurate with the experience and market value of the position. In other words, we should not promote a person to a senior position because they are underpaid in a mid-level position and then tell them, "Okay, now you're a senior-level employee, so do senior-level work." If they are not ready for senior-level work, they will not be able to do it. In many ways, performance and compensation are independent variables. They are related, there is no question about that, but the more we can separate them, the more objective we can be in our appraisal, and our workforce will be equitably compensated.

Another area that requires attention is understanding that some people will let you know when they are ready for that next level, and others will hope that you will notice. You need to notice!

Praise

Praise is the number one issue lacking in the current workforce.[38] Praise is free and should be treated as such. Free of cost, that is. It is said that nothing is free, but we disagree. Smiles are free. It costs us nothing to smile. Yes, it may cost a pretty penny to have a smile that you want, but simply lifting the outer corners of your mouth takes very little effort. In fact, it's easier to do than most other things.[39] Smiling at people as we pass them in the hall and on the street lets them know that we mean no harm. Most of the time when we smile at someone, it is returned. Even when we're all wearing masks, we smile with our eyes.

Praise must be heartfelt. We need to find and notice the good work that is being done and recognize the people who do it. It is best delivered in person, followed by delivering it via the internet with cameras on, and if those are not possible, then deliver it over the phone. But deliver it! Truly let people know you care. The more difficult it is to do, the more it must mean to you, and that will show.

Do you take the time to write a card? Do you take the time to go to a person and tell them what a good job they did? It will mean a lot more than an email. An email or any other indication is better than nothing, but the more meaningful your gesture, the more impactful it will be.

Non-Monetary Rewards (NMRs)

NMRs may have value such as a gift card, in which case it is not a non-cash reward. It still has monetary value. As with all rewards, NMRs should be specific to an action and an individual or team. They are known to serve as motivational devices, which is a logical conclusion. In an environment in which a lack of appreciation leads to negative results, then an abundance of appreciation leads to positive results.

The appreciation only needs to be expressed; it does not need to have monetary value!

We were working one day with a team that was miserable. We spent over an hour filling a whiteboard with complaints from approximately thirty employees. Eventually we reminded them that a lot of good work was being done by the organization. We expressed our surprise at all these issues in the face of such positive results. They were stunned.

Our next step was to ask someone to talk about something that someone else had done that had helped lead to that success. This began a flow of conversation that was very positive and yielded some great ideas for improvements. More importantly, the team was now "bought in" to making improvements, and the overall results were immediately evident.

The receptionist was no longer gloomy. The litter on the floor got picked up. Desks were straightened up, and the overall appearance of the environment brightened.

We wanted to keep that momentum going, so at the next meeting, we arrived with a small stuffed animal that we had bought for eight dollars. The furry little creature had a special meaning to this team, which is not salient to this story. It was not just any stuffed animal. Our thoughtfulness and research that showed that our message was heartfelt.

We asked for more stories about their teammates, and then we said we wanted to award the stuffed animal to the person who had shown that they were most open to change. The room nominated and voted. It didn't take long. There was only one nomination, and the vote was unanimously decided. This individual had led the charge during the past month in making positive changes and keeping the spirits high.

We held the meetings monthly for a year at that organization, and each month, the stuffed animal was awarded to a different person by the team—the same stuffed animal all year, not new animals. There was absolutely no monetary value for each individual because they were only caring for the stuffed animal for the month. Their positive attitude resulted in their being responsible for the stuffed animal for the next month. And it served as motivation. They could not wait to be the one to proudly display this stuffed animal on their desk.

They bought a new animal the following year and continued the tradition. This particular organization serves their community as a non-profit. They help people who struggle with many day-to-day issues. They are truly a giving organization that often sees the worst side of humanity; thus, a positive environment for people to work in and for their clients to experience is imperative. The organization has grown and expanded since then and does an incredible job of making the world a better place.

The Leadership Training Mini-Quads

Even for those folks who are uninterested in following a management career path, understanding the perspective of management can be highly motivational for individual contributors. For this set of actions, we are recommending the specific training that should be prioritized for project managers and frontline leaders.

The Leadership Training Micro-Quads

In this section, we will look at the micro-quads under Leadership Training.

Leadership Training

Time	**Stress**
Negotiate	**Delegate**

Exhibit 23: Dimension 1
Leadership Training Micro-Quads

Negotiate

Train your people in negotiation skills; negotiation skills are fundamentally important for project managers. Train your people in negotiation tactics; leaders will have to negotiate many aspects of projects and employee needs.

Delegate

Provide delegation training for your leaders. One of the most requested topics is delegation. Another fundamental leadership skill. Provide delegation coaching on a continuous basis. Excellent delegation skills are advantageous to both sides of the task.

Time

Provide time management training for your team. Time management skills can be learned and continuously improved. Provide meeting facilitation training for your team. Managers must learn to manage time and to teach time management.

Stress

Provide stress management training for your team. Normal amounts of work stress—commensurate with your capacity—should be manageable in a balanced way. Provide stress management coaching on a continuous basis. HR help might be necessary for high-stress situations.

The Become a Mentor Mini-Quads

Booker T. Washington stated: "Those who are happiest are those who do the most for others." That is why we list this as the highest-level action under Motivate. One of the best ways to help our team members achieve fulfillment at work is by allowing them to help others. Having a mentor is helpful for both sides of the equation. The mentee has the advantage of the mentor's experience, and the mentor feels the satisfaction of helping someone else be successful, which in turn, is advantageous to the organization!

The Become a Mentor Micro-Quads

Now let's take a look at the micro-quads under Become a Mentor.

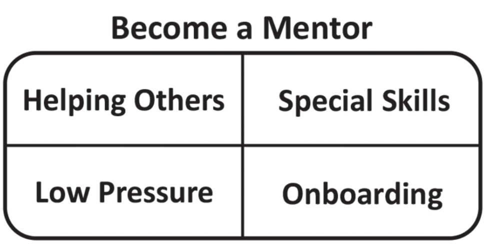

Exhibit 24: Dimension 1 Become a Mentor Micro-Quads

Low-Pressure

Provide low-pressure mentoring opportunities for your people. Mentoring may provide challenges but may be expected to be a long-term effort. Create a list of background tasks that are important and not urgent. Areas being mentored may be lower priority than more immediate work demands.

Onboarding

Have new team members record their onboarding experience. Mentoring is an excellent way to help new team members or employees come up to speed. Create your departmental onboarding requirements. Many policies and practices are unwritten. Mentoring is a great way to understand how to get things done.

Helping Others

Provide opportunities for your team members to help others. Help people broaden their skill set through assignments requiring learning. Determine skills gaps. Mentoring may be used to help sharpen soft (interpersonal) or hard (math-related) skills.

Special Skills

Create a cross-referenced list of skills and skill gaps. Mentors can share their own special skills so that others can leap-frog and develop new skills and techniques. Develop processes that utilize newly acquired skills. Help people practice newly acquired skills through increasingly challenging assignments.

The Nurture Quadrant

There are at least a couple of ways that a person can find themselves in the upper right. Most people are highly motivated when first hired. However, there may be a learning curve even if they are sufficiently proficient in their area. In that case, they earn and learn their way up to the upper right.

The Nurture Mini-Quads

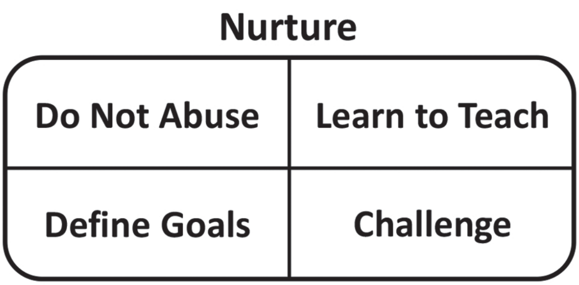

Exhibit 25: Dimension 1 Nurture Mini-Quads

Proactive management in the upper right quadrant is essential to employee retention! Of course, it is sometimes possible to have a new hire who is highly proficient, and of course, they will be highly motivated as they come into the new position. Each situation must be evaluated and managed according to its own characteristics.

The Nurture Micro-Quads

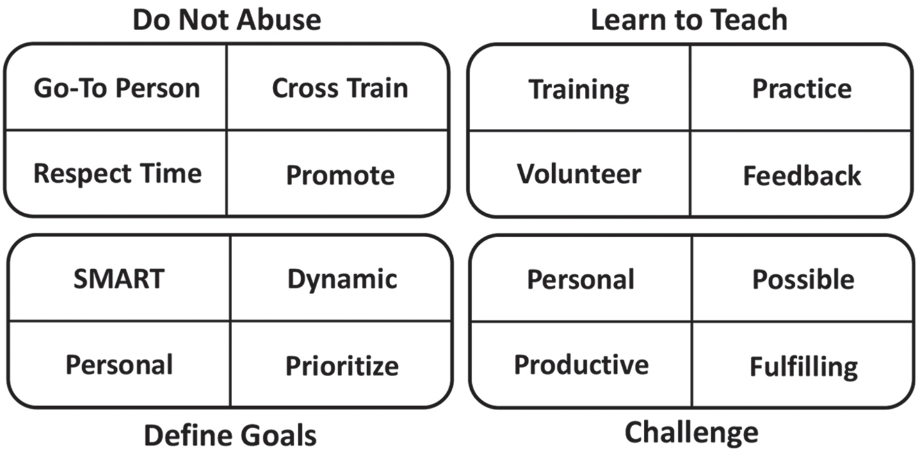

Exhibit 26: Dimension 1 Nurture Micro-Quads

The Define Goals Mini-Quads

Define Goals is an action that also shows up in the Manage Quadrant, and that is intentional. However, the goal of setting goals is a bit different in each quadrant. In our Nurture quadrant, it is important to remember that we are dealing with our high performers. These folks are likely to be setting their own goals. Our job is to be there for support and guidance as it's needed and wanted.

The Define Goals Micro-Quads

Now we will take a look at the micro-quads under Define Goals

Exhibit 27: Dimension 1 Define Goals Micro-Quads

Personal

Help your high performers set personal and professional goals regularly. Look for ways to align personal goals with team skills gaps. Guide personal goals to fill fulfillment gaps that are lacking in the workplace through:

- mentoring or teaching opportunities to share your skills and knowledge with others;
- leadership opportunities in volunteer organizations;
- creative opportunities such as photography clubs, etc.; and
- opportunities to provide travel or excitement such as hiking or climbing clubs.

Prioritize

Decide what is first and do it next.

It is important to work with team members to prioritize goals. Guide the prioritization to optimize results. Then you should work with team members to help them optimize their task list. Help with multiple task prioritization by mixing simple and complex tasks.

SMART

Work with team members to create SMART objectives.

Using SMART objectives helps with communication and clarification. Develop and use information radiators[40] so everyone is aware of progress. Documenting and publicizing SMART objectives help keep people on track.

Dynamic

Review goals regularly to ensure they are still applicable and appropriate.

Goals should be dynamic so that they can be flexible as needs evolve. Review objectives regularly as well to ensure they are still applicable and appropriate. The high-level goals will be fairly stable; the shorter-term tactical objectives will need to be flexible.

The Challenge Mini-Quads

In the Nurture quadrant, Challenge becomes its own set of actions because it is critically important to keep our top players challenged and engaged in the work. Many of these people are quite satisfied with their place in life, their compensation and benefits, and the thing that differentiates the work experience enough to stay at a place of business is the challenge that it provides.

The Challenge Micro-Quads

Next, we will explore the micro-quads under Challenge.

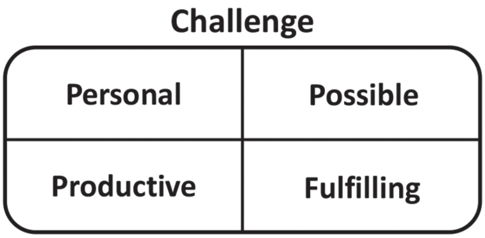

Exhibit 28: Dimension 1 Challenge Micro-Quads

Productive

Define challenges that lead to positive results for the workplace, the team, and the individual.

Challenge for the sake of challenge is not enough. We need to feel needed. We need to *be* needed! Define challenges that are not overly competitive. While a bit of competition can be healthy and fun, too much can detract from a cooperative and collaborative environment.

Fulfilling

Define challenges that are personally fulfilling.

Find the gaps in fulfillment and close them. It is possible that some, if not most, of a person's fulfillment in life comes from outside work. Try to find challenges and goals that serve multiple fulfillment roles. Define challenges that involve both sides of the brain. Think about combining left- and right-brained activities to help foster creativity and innovation.

Personal

Define challenges that are personal.

A high performer is likely to continue performing at a high level and therefore goals can be a bit more personal. Define challenges that serve the individual. Personal goals may eventually lead to a person leaving your team. This should not be discouraged, as this loss is offset by their enthusiasm. Use their energy and your knowledge of the situation to plan accordingly for future resource needs.

Possible

Be sure that the challenges are possible. Measure progress along the way, and adjust goals to stay aligned with organizational and personal needs. Define challenges that are physically appropriate. Challenges must be possible in terms of physical reality as well as existential feasibility. Do we legitimately have the time and resources necessary to complete this challenge?

The Do Not Abuse Mini-Quads

While there are many different forms of abuse, in order for a behavior to be categorized as abusive, there must exist an intention of harm.[41] A good leader would never intend harm to a team member, regardless of their performance level. This seems like an unnecessary action step since it would never happen in the first place! But—is that true?

Our point with openly stating Do Not Abuse is to remind leaders that some of our actions, while not necessarily intentionally harmful, are in fact, harmful! When we ignore the positives, when we do not appreciate the great work and good behaviors, when we constantly interrupt people who are 'in the zone',[42] and when we mismanage underperformance, we are undermining the good work that our high performers are doing.

It's easy to get lost in this. After all, as leaders and project managers, we must manage the variance between goals and results. Actual performance vs. predicted performance. Spending the majority of our time understanding and solving problems leaves little time for thinking about the plethora of things that are going right.

We hope that by reminding ourselves to not abuse our best performers, we'll remember to do better than that. They deserve our best, and the following actions will help remind us to give it to them.

The Do Not Abuse Micro-Quads

Now we will take a look at the micro-quads under Do Not Abuse.

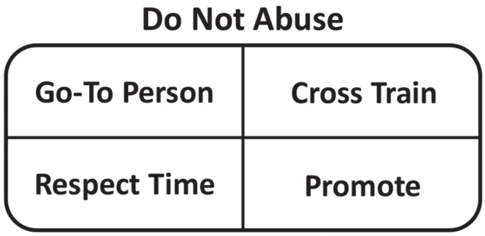

Exhibit 29: Dimension 1 Do Not Abuse Micro-Quads

Respect Time

Always be on time.

Always? Yes! Do not start meetings late. That means that you need to be at the meeting early to be certain everything is set up and ready to start on time. Always end meetings on time. People have other commitments, even if they are not showing on their calendar. If they expected to leave a meeting by 10:00 a.m., do not continue past 10:00 a.m. Instead, reschedule for another time.

Try to avoid interrupting people. While it may only take a minute of your time to ask the question to get the information you need, you have pulled them out of their zone. Allow time for personal and professional growth. It is important that we allow our people to develop. Do not overfill calendars. Expecting to have eight hours of productive work in an eight-hour day is just unrealistic.

Promote

Recommend promotions when they are earned. Be sure that each position matches the person's contribution and expertise. Promotions may or may not be available, and the decision to promote may or may not be up to you. We are not telling you to promote. We are telling you to recommend a promotion when you believe it is deserved.

We need to be extremely careful here and not disclose or discuss promotions until the official documentation is ready. Promotions usually involve HR, and if you are not the direct supervisor, then you are probably not having the promotion discussion with the team member.

You should not tell an individual that you have recommended them for promotion. They may not receive a promotion, and your discussion taken out of context could be mistaken as a promise. Your job as a frontline leader is to provide information, not necessarily to make a decision.

Make an effort to learn about your people. Be sure that promotions are planned, deserved, and unbiased. Dave once had an experience as a manager wherein an employee from a different department came to him and asked why he wasn't being promoted. He was frustrated that he had been with the company for five years in the same position. His opinion was that after five years, he should be promoted because he had become so proficient at his job.

What new skills had he learned in the five years? How had he advanced? Had he gone to school to increase his value to the company? The answer to each was no, so when he saw it from that perspective, the employee began attending night school to finish his degree and was then able to move up in the company.

Go-To Person

How can we be certain that we are nurturing and not abusing? We must be highly selective about what we are going to our go-to people for. Is it within their area of responsibility? Or are we going to them only to make our lives easier? Create a RACI (Responsibility/ Accountability/ Consult/ Inform) matrix.[43] Be sure this is a two-way street that involves no positive bias.

Cross Train

Ask your best performers to cross train others on special skills. Our go-to people have earned that name because we go to them a lot. Too much! They have become such experts in an area that we often cannot afford the luxury of cross-training. If the person becomes bored with the work and leaves without having trained a successor, we will have to bring someone up to speed at the worst possible time.

Work toward creating a team of generalized specialists. A generalized specialist is someone who has deep subject matter expertise in one or more areas and shallow knowledge in a broader spectrum. For example, a mechanical engineer may have some programming skills. Perhaps not to the level of a software developer, but many engineering programs include optional programming courses prior to or in parallel with the major area of focus. So, a mechanical engineer may be asked to generate automated testing programs or be available as a software tester.

The Learn to Teach Mini-Quads

Understanding how to do something or having subject matter expertise does not necessarily prepare a person to be able to teach that topic or skill. Teaching is a skill and profession unto itself. Long considered to be the noblest profession of all, allowing our best performers to learn to teach is a definite win-win-win. They win by being able to give back, the organization wins through the sharing of knowledge and cross-training, and the individuals win by growing in their profession and increasing their value to the organization.

The Learn to Teach Micro-Quads

Now we will take a look at the micro-quads under Learn to Teach.

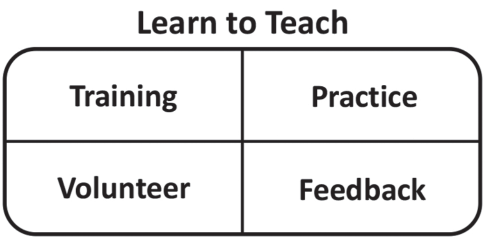

Exhibit 30: Dimension 1 Learn to Teach Micro-Quads

Volunteer

Volunteer to teach.

Often, the art of teaching can be learned through volunteer activities. This can be in work, for example, teaching small lessons at staff meetings. Volunteer your services to your place of worship or an organization such as the PMI. Volunteering is needed outside of work at volunteer organizations, such as the PMI, which offers multiple opportunities to teach and deliver presentations.

Feedback

Provide feedback to hone teaching skills.

Feedback is essential to growth. Direct feedback can be garnered through surveys at the conclusion of sessions. Promote continuous improvement. The feedback cycle helps teachers continue to learn. It's the truest definition of a perpetual motion engine. Impossible in physics,[44] it is indeed possible to have a positive learning cycle in which the output energy is equal to or greater than the input energy.

Training

Help your people learn to teach by sending them to seminars that specialize in this skill.

Learning the skill of training should not be taken for granted. Train your trainers to be engaging. There is much to learn about teaching, but the basics can be learned so that your folks will be engaging as well as informative.

Practice

Allow your trainers time to practice.

Teaching is a skill that can be improved through practice. That is exactly why, as so many before and after her, Lisa was a student teacher before she was permitted to legally shape the minds of children without being under the tutelage of a seasoned teacher.

There are many opportunities for you to learn to teach and practice. Many volunteer organizations offer classes to build your skills and confidence. What is your hobby? Dave taught motorcycle safety, gaining free training in adult education and actually being paid to practice teaching in the classroom as well as on the practice range. Voice projection is a whole new experience when communicating to students on the range. Twelve to fifteen motorcycles, many ridden by first-time riders, all wearing helmets, and you want them to look at where they are going or, rather, where they need to go. Dave learned a lot about training while doing something he loved. Find opportunities for your trainers to practice. There are many opportunities to practice, both in and out of the workplace:

- Community colleges often allow you to create and market your own class.
- Create a presentation about your department or a particular new development and share it with your colleagues. If you offer pizza, they will come.
- Join a volunteer organization and deliver presentations at community meetings to gain support.
- Become a member of a Board of Directors, and share your expertise with others.
- Dare we suggest supporting a politician who supports your values? You can make a difference!


2

Dimension 2: Collaboration

In Dimension 2, the collaboration dimension, the matrix terms consider that the frontline leader is now in a different role. We are not managing performance but rather attempting to collaborate across the organizational spectrum. Remember, our perspective is that of a frontline leader in an organization that is not necessarily supportive of cross-organizational or cross-functional communication and collaboration.

The reason for this perspective is that if you are fortunate enough to be with an organization that respects and supports enterprise-wide radical transparency, then you are probably not in need of advice for this area. You may still be able to use the tools though! (See Exhibit 31.)

The Manage Quadrant

For the Manage Quadrant, we mean truly managing the environment. We distinguish between leadership and management in many ways. One of the differences is that leadership is about people, and management is about the environment. Leadership is often most effective through service. We drive results, we do not drive people. We lead people by serving them, providing them with resources, and ensuring a clear understanding of the goals and the definition of success. (See Exhibit 32.)

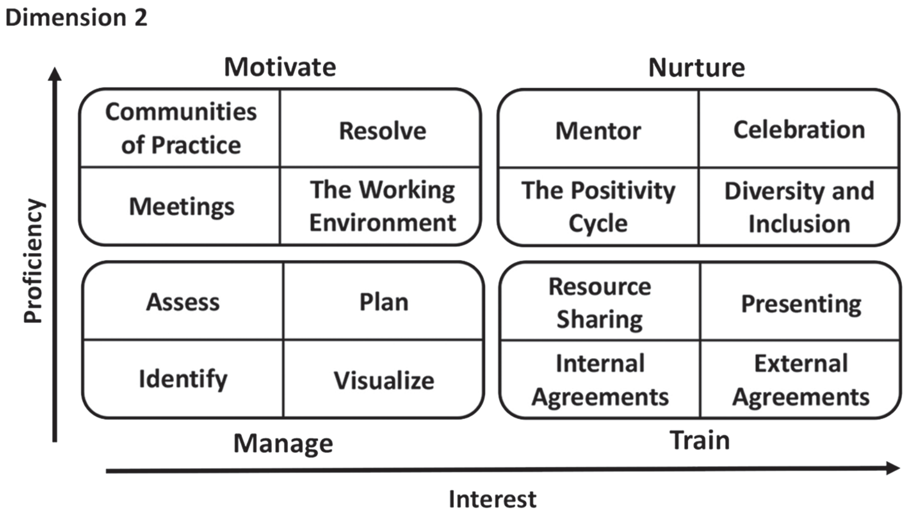

Exhibit 31: Dimension 2 Mini-Quads

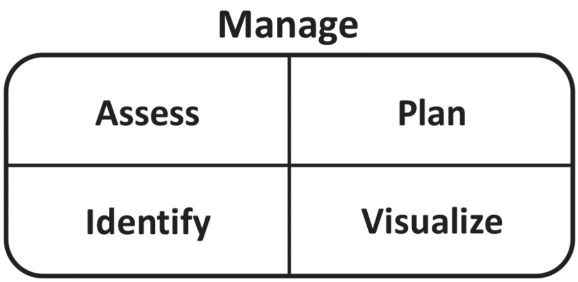

Exhibit 32: Dimension 2 Manage Mini-Quads

Management is all about the environment. The separation of management from leadership does not mean that there are different people doing the jobs. In fact, the role of project manager or frontline leader includes duties and responsibilities from both sides of the leadership management spectrum.

Many of the day-to-day tasks managers used to do have been automated or eliminated. Think about the level of correspondence you handle each day. How would you handle it in the absence of digital tools? Handwritten memos, personal conversations, phone calls, and meetings—these were the tools in the pre-digital era. Now we have instant global capability, incredible communications technology, and yet, one of the most common complaints from employees in all positions is the fact that they can't keep up. There isn't enough time!

The fact is that there is enough time. But to do what? That is the question. People are always looking for ways to find more time. We do not need more time; we need to use the time we have more effectively. Of course, that's subjective too, so let's define it within our leadership role. It means that we need to manage the environment so that our teams have enough time to be successful.

The Manage Quadrant, therefore, is all about managing the environment around our team in a manner that sets them up for success.

It is surprising that so many of our workshop attendees describe organizations and issues that are hierarchical and vertically structured in a way that inhibits or completely blocks interdepartmental communications. Below we list some actions that frontline leaders can take to start breaking through those barriers.

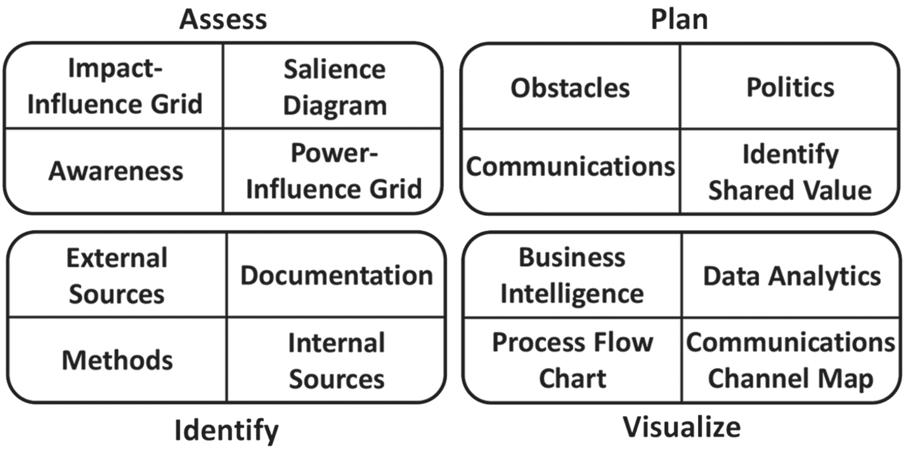

Exhibit 33: Dimension 2 Manage Micro-Quads

The Identify Mini-Quads

In this section, we will explore the attributes and actions available in the Identify mini-quadrant.

The Identify Micro-Quads

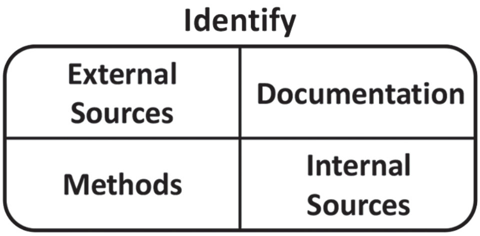

Exhibit 34: Dimension 2 Identify Micro-Quads

Methods

Remembering that we are in Dimension 2 of the matrix, we are working across organizational boundaries and reaching out to our colleagues. Our action is to identify the methods of communication being used. (See Exhibit 34.) Here are some examples:

- In-person meetings
- Zoom or other online remote video meetings
- Slack, teams, or other enterprise tools
- Casual conversations
- Email
- Instant messaging

Internal Sources

Our action is to identify all the sources of information. It comes from surprising places at times. You can use an organizational chart and cross-identify it as a communications flow map. Simply draw the actual communication flows on the organizational chart to understand it more clearly.

Some examples of internal sources of information are:

- an organization's library;
- project information repositories; and
- colleagues and people who have experience in the organization.

External Sources

It is important to understand the sensitivity of the organization to external sources of information. Add these to the communications flow map that you created to identify the information flow. This will help you be prepared for surprises that may come from outside the organization and even be prepared to help your teams or your colleagues when those unknown unknown risks pop up.

Some examples of external sources of information are:

- chat rooms and social media;
- customers and other stakeholders; and
- news and stock reports.

Documentation

Be sure to document the contact and other information you gather in a place that is easy to access and update. The information is going to change over time, and you will need quick access. Be certain that your filing system makes sense to you so that you can find information when you need it.

The Visualize Mini-Quads

In this section, we will explore the attributes and actions available in the Visualize mini-quadrant.

The Visualize Micro-Quads

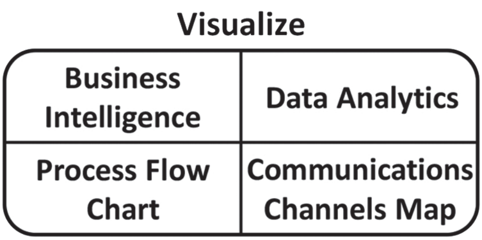

Exhibit 35: Dimension 2 Visualize Micro-Quads

Process Flow Chart

A process flow chart can be simple and can also be used to describe the entire work or information flow for an organization.[45] The more inclusive of a process flow chart, the better you will be able to understand the flow of work and information.

Communication Channels Map

Use a communication channels map to identify the formal and informal paths of communication. This is a great tool for understanding how information is transferred throughout the organization. More importantly it is a great tool for understanding where communications may be blocked.[46]

The action is to determine where and why communications may be stifled between departments and to open communication channels where it would be helpful to your team, the teams with whom you are opening communications channels, and all your stakeholders.

Business Intelligence

Business intelligence should be openly shared among middle management. The action here is to determine what business intelligence is available, what is needed, and how you can improve the flow of business intelligence among your colleagues to the betterment of the organization.

Some examples of business intelligence include:

- data analysis;
- competitive information;
- reusable content; and
- demographic stakeholder data.

Data Analytics

Data analytics is a decision-making tool that allows business leaders to have the information they need to move forward. The information must be derived from mountains of data that is useless without an efficient method of analyzing, categorizing, and interpreting into results.

Our action here is to be certain we use data when presenting information or proposing change.

The Assess Mini-Quads

In this section, we will explore the attributes and actions available in the Assess mini-quadrant.

The Assess Micro-Quads

Assess

Impact-Influence Grid	Salience Diagram
Awareness	Power-Influence Grid

Exhibit 36: Dimension 2 Assess Micro-Quads

Awareness

We are assessing awareness in Dimension 2. We want to know how aware our colleagues are of us and how we may be able to improve our interactions with them. The action here is simple conversations, getting to know those around you, and allowing them to know you. Building trusting relationships begins with building a relationship.

Power-Influence Grid

Use a Power-Influence Grid[47] to determine where you are in relation to your colleagues within this dimension.

Impact-Influence Grid

Alternatively, or additionally, add information from an Impact-Influence Grid[48] to deepen your understanding of the view of your needs from the perspective of your colleagues.

Salience Diagram

Use a Salience Diagram[49] to determine stakeholder salience to each task or project for which you are responsible, as each may have different points of view.

The Plan Mini-Quads

In this section, we will explore the attributes and actions available in the Plan mini-quadrant.

The Plan Micro-Quads

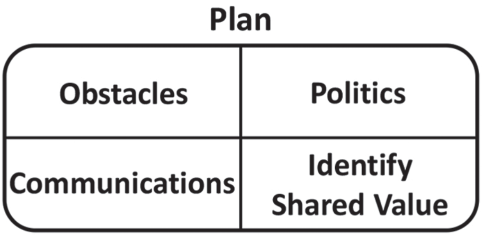

Exhibit 37: Dimension 2 Plan Micro-Quads

Communications

Using information gathered in the previous section, you can now plan communications with your colleagues to increase interdepartmental collaboration.

Identify Shared Value

Through the newly established communications paths, we can work together with our colleagues to identify areas of shared business value. In these areas of commonality, we can prioritize the work and join forces to complete the work that returns the highest business value organizationally, not just departmentally.

Obstacles

The establishment of continuous and regular communications with our colleagues enables us to overcome obstacles much more quickly and effectively, because before we implement changes, especially urgent changes, we should take care that by fixing a problem for our team, we do not create problems for other teams.

The action is to understand the obstacles that may exist at the Dimension 2 level. Examples of these are:

- siloed communications preventing clear information flow;
- power or knowledge hoarding, preventing information flow; and
- managerial style differences that manifest as communication barriers.

Politics

Politics, in the sense of office politics, is about understanding that what should be happening may not be happening. In live workshops, we allow opportunities for participants to share their experiences. The ultimate success of this is when a participant goes back to work with solutions to their problems, or at least suggestions for things to try. When the topic is office politics, it is not at all unusual to hear the exclamation 'but that shouldn't be happening' as a participant is explaining something that is actually happening or has happened in the past.

When office politics are at play, we may feel resistance to ideas or experience outright roadblocks thrown up in what we believe is the way of progress. Clearly if someone is creating impedance, then there is disagreement as to what is positive progress. But when office politics are at play, the resistance and roadblocks are not obvious. They are often hidden behind personal agendas. For example, let's say you need to have a team meeting on a weekly basis. There is a key attendee, and they are resistant to the meeting itself. The underlying reason is that they don't want to add another meeting to their schedule. So, they try to convince you that a meeting is not needed. You'll waste a lot of time trying to find a time for the meeting that is mutually agreeable when the real solution is to allow the key individual to send a proxy—someone everyone can count on to communicate effectively and with enough authority to move decision-making forward.

The action here is to begin to understand the politics that drive behaviors. Look at what's not happening and listen to what's not being said, and then seek to fill in the gaps with data and information, not rumor and speculation.

The Train Quadrant

Here we are talking about training the organization itself to be a learning enterprise

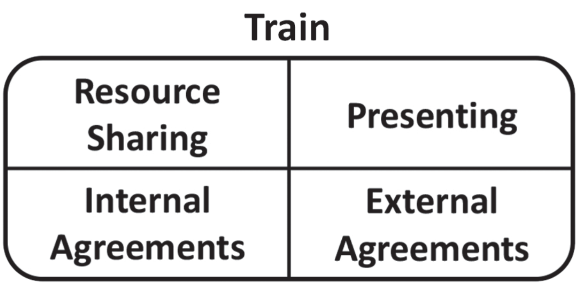

Exhibit 38: Dimension 2 Train Mini-Quads

If a person requires humility to be open to learning, how does that translate to an organization? What characteristics do we need to see within an organization to identify it as one that embraces a learning environment?

The answer lies in behaviors. We have often said that we are behaviorists, not psychoanalysts. While it is worthwhile in many situations to determine the root cause of behaviors or performance issues, there are times, many times in fact, when the behaviors need to be changed or corrected immediately. Performance issues generally do not correct themselves—after all, if they did, there wouldn't be an issue to begin with—and so they must be dealt with quickly. There is no time, nor do most managers have the expertise or background, to examine and correct the root cause. We need the behaviors to change immediately and performance metrics to be met immediately.

And the question here is, how can we train an organization to change and do it from the inside out? We are not in senior management. We are simply trying to

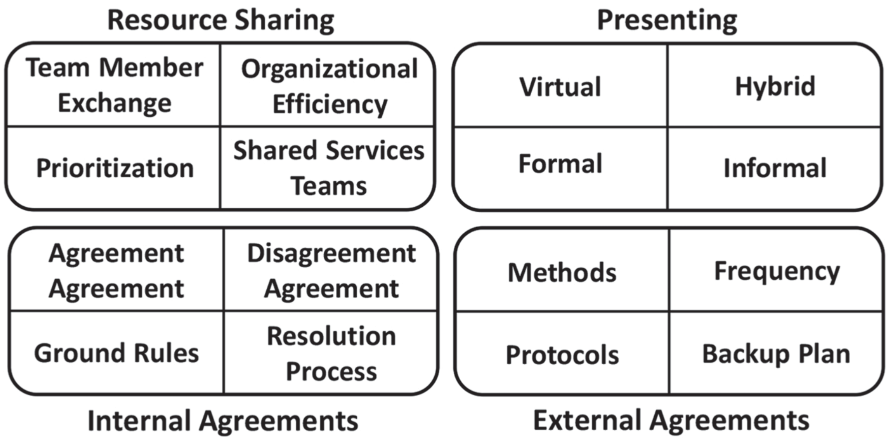

Exhibit 39: Dimension 2 Train Micro-Quads

execute the objectives that senior management has laid out. They are counting on us to know how to get it done…and to do so! See Exhibit 39 for some actions that can help.

The Internal Agreements Mini-Quads

These are the agreements that we make within our own teams and close communication paths. These are almost always informal, however, should be documented, shared, and discussed.[50]

The Internal Agreements Micro-Quads

Internal Agreements

Agreement Agreement	Disagreement Agreement
Ground Rules	Resolution Process

Exhibit 40: Dimension 2 Internal Agreements Micro-Quads

Ground Rules

What a great way to prevent conflict! Agree ahead of time on what you are going to do about disagreements. Set ground rules for various meeting types and scenarios.[51]

Resolution Process

One of the most important ground rules will be the resolution process. In order to grant teams autonomy, they must be able to come to resolution in the face of conflict because they have to make a decision and take action. If a team is going to be paralyzed by conflict in the decision-making process, they eventually will sacrifice autonomy and succumb to authoritarian leadership. Or else the team will simply stall.

Therefore, it is imperative that a resolution process be available that leads the team through a decision process and results in action.[52]

Agreement Agreement

An Agreement Agreement is an agreement to describe how to come to agreement. The authority level of the team will determine the scope within which this agreement can be applied.

Disagreement Agreement

The Disagreement Agreement is possibly the most important aspect of the working agreement with your team because without it, a decision may be futile. If the team moves forward with an action that is not supported, or worse, resisted or opposed, by a team member, it is hard to make forward progress.

The Disagreement Agreement is a simple statement that the entire team agrees to, such as, I will support the decisions and forward actions of the team in a positive manner.

In fact, we like to get people to say that they will support ideas with which they disagree, as if they were their own ideas! Think about it. You and the team need to move forward. The team is in conflict and cannot agree on a forward action. Through the decision-making process, an action is determined.

If there are team members who now cannot support that action, then they should not be on that team, as resistance from within the team is almost certainly going to cause havoc and destruction.

The External Agreements Mini-Quads

These are the agreements that are made between our teams and people or groups of people outside of our team.[53]

The External Agreements Micro-Quads

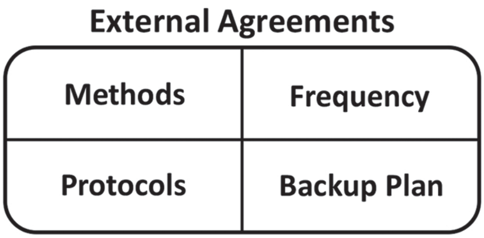

Exhibit 41: Dimension 2 External Agreements Micro-Quads

Protocols

These are simply the rules and guidelines to be followed. They should be reviewed by everyone in the communication loop to ensure that the level of desired information flow is supported by the protocol and that everyone can be compliant with the rules.

Backup Plan

Identify a depth and breadth for the communication plan to ensure that information flow is not dependent on any individual or potential single point of failure.

Methods

We are in Dimension 2, training quad, lower right mini-quad. What that indicates is that external agreements, and particularly agreements for communication and collaboration between teams and department managers, have not been a priority in this organization. We have identified it as an area of low proficiency and not high interest or motivation to increase interdepartmental cooperation.

Attempting to make change in this area is likely to be greeted with resistance, and the more the change imposes a burden or perceived burden on the recipients, the higher the resistance to the point where you are unable to make a change.

Our action here is to identify methods of interdepartmental and intra-team communications that do not impose upon people's time. Examples include software-driven dashboards and Kanban boards.[54]

Frequency

Determine a frequency of communications together with the external teams. Be certain that everyone can live up to their commitments so that time is not wasted when information is needed. Create plans and commitments that yield information at the most appropriate times. Information that is aged may diminish in value, and information that is premature may lead to faulty guidance.

The Resource Sharing Mini-Quads

There are many organizational resources that must be shared between and among teams.

The Resource Sharing Micro-Quads

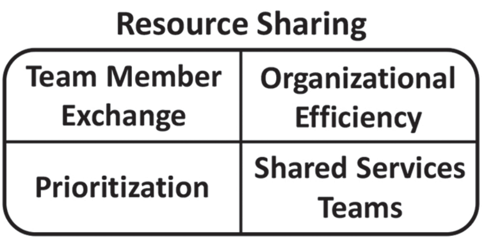

Exhibit 42: Dimension 2 Resource Sharing Micro-Quads

Prioritization

Hardware and facility resources are relatively easy to schedule. We can reserve conference rooms, lab space, etc. Resource sharing in this context, however, is referring to the practice of assigning an individual responsibility on more than one project. Or in our case, a frontline leader or project manager with team members who are assigned to the team on a part-time basis. This is one of the primary reasons for the existence of Dimension 2 in *The Engagement Matrix*.

Shared Services Teams

There are many organizational issues that can be traced back to resource sharing as a root cause. Employee engagement and retention are at the top of the list.[55] Reduced productivity leading to late and over-budget projects are quite common.[56]

Team Member Exchange

Whether or not the issue is caused by the use of the term "human resources", certainly the way managers think of things is impacted by that terminology. We know that the term evolved from personnel, but personnel is a better term. Or maybe we could just say people.

No matter what we call them, scheduling people as if they were machines or conference rooms is a fool's folly. The reason is simple: the level of uncertainty is different. A conference room will sit there and be a conference room until someone changes it. A lab instrument will do what it is programmed to do until it is broken or programmed differently. People, on the other hand, are unpredictable.

Organizational Efficiency

Let's compare two scenarios—the first is a conference room shared between two project teams, and the other is a person shared between the same two project teams.

The conference room is scheduled via the company intranet. Slack, Microsoft Teams, whatever project management information system is being used.[57] When there is overlap, it is clear on the schedule. It is a binary system. The conference room is either busy or it is not. It cannot accommodate both teams simultaneously. Therefore, any conflict must be worked out between the two project managers. They have the authority to do so. They meet, they talk, they work it out.

Now the two project managers are sharing a resource: a person, T. If we ignore all the factors except the simple fact that T is working on two projects simultaneously, we know that there will be a loss of time when T switches from one project to another. The question will become when to do the shift. Project A in the morning and B in the afternoon? Project A for half the week, and Project B for half the week? The issue is that there will be a loss for every shift.[58]

Therefore, logic would have it that the least interruptive way to share one resource between two teams would be to divide the week in half. One shift from Project A to B. And then of course, from B back to A. One of those shifts would be mid-week, and the actual shift change would be over lunch, the other shift change over the weekend. This definitely minimizes the interruptive effects, but...what is the reality of this? This is only one step away from letting T finish one project before starting another.

Now, we need to distinguish between critical resources (those on the critical path) and resources who are on paths that have float. Let's say you have a team of ten people working full-time, and you need another person half-time for the entire project duration. This is an ideal shared-resource scenario that is a key to an agile or Disciplined Agile environment.[59]

However, a person who is a critical resource, either on the critical path of a traditional project or a key team member of an agile project, is by definition needed full-time by the project. Anything less than that requires planning on the part of the project manager or team leader to ensure that resources are aligned and the work can proceed as efficiently as possible.

Therein lies the problem; efficiency begins to become the focus. How can we align the schedules so that meetings and other daily interactions take place effectively? A conference room or a piece of equipment doesn't care what it was just doing in order to do quite efficiently what it must do next. This, however, is not true of our precious species!

We cannot, generally speaking, switch our brains from one project to another with no loss of time or without a degradation of the integrity of the work. In other words, interruptions and switching projects tend to cause mistakes and delays.

Quite often the resultant problem is left either to the individual team member or to the project managers of the individual projects to resolve. They do not have the authority to solve the problem. The individuals are assigned at the program or portfolio level of different organizations, each with their own priorities. Therefore, all projects are number one; it's just that each is a number one priority to its own management hierarchy.

Therefore, when the conflict is HR related, the project managers can't meet and talk about it and resolve it because they do not have the authority to do so. And quite often, these conflicts don't reveal themselves as readily as a conference room that is already booked or a piece of lab equipment that is already in use.

The team members may begin putting in extra effort. Things appear to be getting done—until the mistakes and technical debt builds up or the team members get burned out and leave.

The Presenting Mini-Quads

In this section, we will explore the attributes and actions available in the Presenting mini-quadrant.

The Presenting Micro-Quads

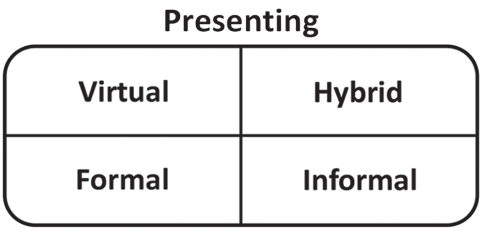

Exhibit 43: Dimension 2 Presenting Micro-Quads

Formal

In this dimension we are talking about using formal presentations as a way of training your colleagues in the necessity of cross-organizational communications. A better way of presenting it would probably be to explain the advantages of cross-organizational communications. You'll want to show them the benefits and ensure that you can answer any concerns about risks (or perceived risks) that you may be introducing into the environment.

Informal

Informal presentations won't be taken as seriously as formal presentations and probably won't be viewed by senior leadership. They are a great way to practice for the formal presentation and to get feedback on your ideas!

Virtual

Virtual presentations require training and technology. Be certain that you have both. Be prepared not only to be able to present, engage, and answer questions about your content, but as the host, you must also be prepared to help people with their technology.

Hybrid

A hybrid meeting is one in which some attendees are remote and some are in person. Action for hybrid meetings: don't leave anyone out! Pay equal attention to onsite and remote attendees.

The Motivate Quadrant

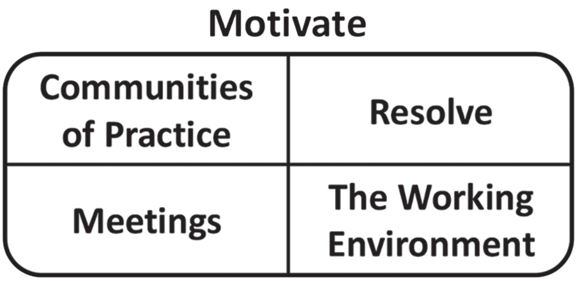

Exhibit 44: Dimension 2 Motivate Mini-Quads

How in the world do we motivate those around us to action? Sometimes we will be asking people to go against the paradigm, not the rules! It's important to understand that we do not believe in not following the rules. Rules that are well thought out are put in place to protect people or help them do their jobs, are current, relevant, and make sense, and most importantly, lead to people doing the right thing.

Rules do not always represent the right thing, and when we discover that to be the case, our responsibility is to participate in the evolution. Change the rules.

But that's not what we're talking about here. Here we are talking about persuading people to do what we believe is right, meaning that we believe what we are suggesting is going to be good for the organization, for the enterprise.

Everyone may or may not agree with that perspective. And while we are not going to ask people to break rules, we may be asking them to go against the norm. If you think people resist change, wait until you ask them not only to subject themselves to change but also to go against the status quo. The existing operational paradigm may currently work to their advantage, and so we must find ways to make a change attractive.

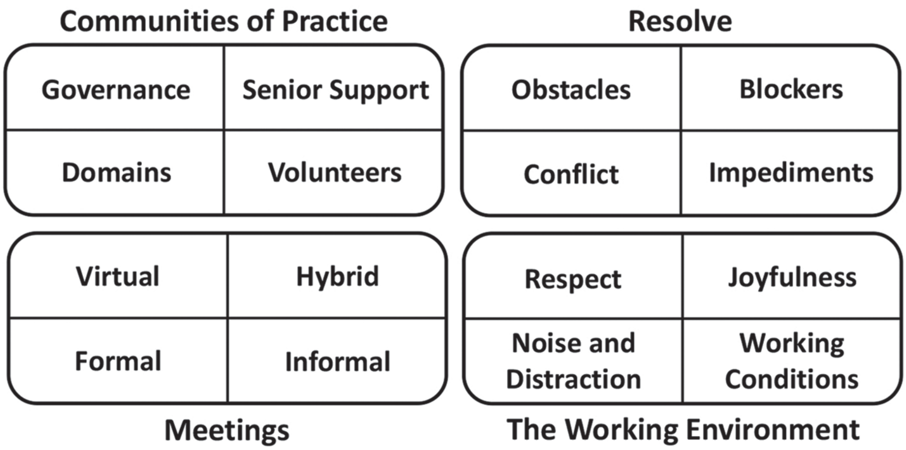

Exhibit 45: Dimension 2 Motivate Micro-Quads

The Meetings Mini-Quads

We're starting with meetings to motivate people. We have two goals when it comes to meetings: (1) conduct as few as possible, and (2) make them short.

The Meetings Micro-Quads

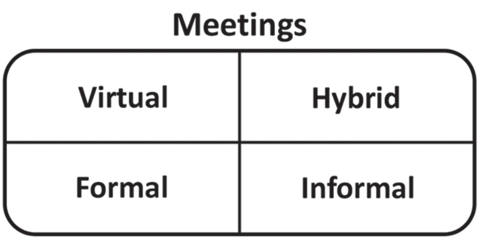

Exhibit 46: Dimension 2 Meetings Micro-Quads

Formal

For us, a formal meeting is one that has a published agenda, a limited timeframe, a specific purpose, and a record of the discussion and action items. An informal meeting would be one that does not meet these conditions. We call a meeting without an agenda a conversation.

Informal

We hear a lot of discussion these days about informal meetings, particularly about the fact that they are missing from remote and partially remote, or hybrid, workplaces. What does it even mean to have an "informal" meeting? That depends on what it means to have a formal meeting. Or what it means to you and your organization.

When we find ourselves sitting in a conference room in a meeting that's going around in circles, we look for the agenda. If there isn't one, then you can begin to understand why the conversation may be going around in circles. Without an agenda, you have no real direction, and you are not in a real meeting. You are in a conversation that is out of control and is probably wasting your time and demoralizing the team. Few people enjoy wasting time in meetings.

There are so many creative ways to waste time in meetings that it's difficult to keep them efficient. And even more difficult in the case of informal meetings because by their own definition, they do not require agendas or minutes or action items. They are, quite simply, conversations.

Virtual

We find it funny that people think that informal conversations, or rather the absence of them, is hurting productivity. Many hallway conversations are about non-work topics. Before the creation of the remote work environment, everyone was in the workplace and there were plenty of informal conversations. Most of them were not productive in terms of direct value add to the project. They are, however, extremely productive in breaking down barriers and crossing organizational boundaries. Informal conversations help build relationships, but they do not replace formal communications. During the hundred plus years when knowledge work became the norm for millions of Americans, we were in non-remote environments. If the current working theory is that the informal hallway conversations were effective in removing organizational barriers, then why were there so many organizational barriers in that same timeframe?

One of the seemingly insurmountable organizational barriers is the siloed organization, built around functional hierarchies and endorsing the local serfdoms that grow around locally charismatic leaders. The most effective managers get what they want for their team. Effective, that is, in getting what they want or need for their teams. That is made easier if they are effective in their jobs and achieving the goals and outcomes that are noticed and rewarded.

And so, we think the general memory of informal conversations as productive is overrated at best and at worst completely fictitious. We surely must get past this romantic illusion of the way things were or the way we wish things would be. Technology and the advantages that technology provides are real, and we should not ignore them. Without virtual communications technology, we are limited by geographic boundaries. The most impact is felt in resource sourcing.

Hybrid

With technology, the world is the limit. We can focus on value add, experience, background, and skills. We can improve and increase our diversity because we aren't looking only where we live for resources. We can review the diversity of our team and then recruit in areas that fulfill our needs while expanding our horizons. For example, companies that Dave worked at recruited from well-known colleges and universities. The top graduates would have their choice of location. Some would want to be close to home, others had romantic interests or other personal pursuits, such as skiing or surfing, pulling them in a particular direction. When you are competing for the best of the best, the basics such as compensation and benefits become commodities. They are necessary. And of course, you can't change the location of the company, so unless you're already located on Pebble Beach or in the center of the universe (New England, according to Dave), then you're going to have to come up with other ways to compete.

Many companies are located where they are because of a resource supply. It may be physical or natural resources; in many cases, it is human resources. The location may or may not be of particular interest to the general public or the top graduate of a top school. Or to any graduate of any school. No, we are not going to name names in terms of locations but…if you're working in a stinky location, you know what we're talking about.

Obviously with remote work, this goes away entirely. People can live where they want to live and work where they want to work. We simply have to know how to be sure we are getting work done. And that is a matter of leadership and management by objectives. As project managers, we know how to do that.

The Working Environment Mini-Quads

The actions and options in this section will help guide you to create the type of working environment that enhances morale and improves productivity.

The Working Environment Micro-Quads

The Working Environment

Respect	**Joyfulness**
Noise and Distraction	**Working Conditions**

Exhibit 47: Dimension 2 The Working Environment Micro-Quads

Noise and Distraction

We cannot singularly state that noise and distraction are bad. What is music to one person and helps them concentrate is noise and distraction to another. Our job is to create an environment in which everyone can work comfortably. Since the ideal environment is different for different people, compromise in this area is likely to be needed. For example, a rule that limits noise such as radio or music to within the hearing distance of one's own work area seems reasonable, while trying to enforce a silent work area may be overmanaging and unnecessary.

Working Conditions

The working conditions are controlled mainly by management or factors outside of our control, but we, as frontline leaders, need to take responsibility for working conditions to the greatest extent possible. Not only is it the right thing to do, but it will also lead to the highest performance.

Respect

Clearly, we want to ensure that the environment encourages respect for one another up and down the line. The reason that we emphasize this is that we need to look for the seeds of disrespect. As frontline leaders, we have tremendous opportunities to intercede in disrespectful situations and correct them. At work it should be relatively easy because there is a common goal and a framework of business ethics that applies to everyone on the team.

We are optimistic that by eliminating disrespect in the workplace, where and when it may exist, the attitude will spread, and through respect for one another, the world itself will become a better place.

Joyfulness

Joyfulness isn't just about balloons and parties. Injecting and spreading joyfulness in a team is probably the number one component that a leader can bring. Joy is "a feeling of great pleasure and happiness."[60] How can you bring about joy in your team? Care about them and demonstrate that care with your actions. Provide leadership and guidance. Be fair. Get all sides of all situations before making decisions. Stick up for them, and most importantly, protect their time. And parties now and then are nice too!

The Communities of Practice Mini-Quads

In this section, we will explore the attributes and actions available in the Communities of Practice mini-quadrant.

The Communities of Practice Micro-Quads

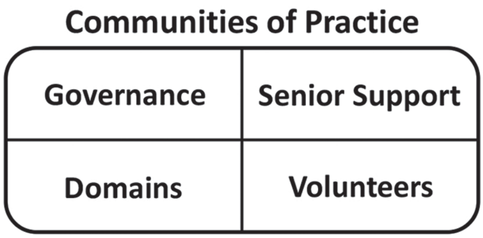

Exhibit 48: Dimension 2 Communities of Practice Micro-Quads

Domains

A community of practice[61] is a group of people with similar interests who are interested in improving themselves and helping one another to improve in an area. One example of this is agile project management. Agile as a discipline, or rather, a mindset, is a way of doing business that has grown and evolved far beyond the single scope of software development, and it is essential that everyone in the organization is working toward building business agility.

Volunteers

Communities of practice are generally grassroots driven and therefore staffed and organized by volunteers.

Governance

Governance of communities of practice should be left to the teams themselves as much as possible. When organizational governance is necessary, it should be service driven rather than authoritarian, out of respect for the volunteer nature of the community of practice.

Senior Support

Senior management support is necessary in order to provide the time for people to attend meetings and the autonomy to try new ideas.

The Resolve Mini-Quads

In this section, we will explore the attributes and actions available in the Resolve mini-quadrant.

The Resolve Micro-Quads

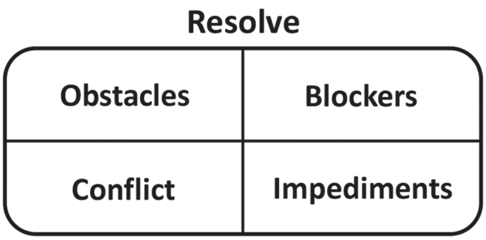

Exhibit 49: Dimension 2 Resolve Micro-Quads

Conflict

A motivational environment is one in which conflict can exist in a positive way. It is constructive and resolved either by the team through its decision-making process or by the team leader or levels above if necessary.

Impediments

Organizing problems and challenges into categories is helpful in prioritizing them. Impediments are low-level hurdles that can be overcome by the team with little assistance from leadership.

Obstacles

Obstacles are problems that will require leadership assistance. These can be addressed effectively by the team leader, frontline leader, and low- to mid-level manager.

Blockers

Senior-level management help is needed!

The Nurture Quadrant

Nurture

Mentor	Celebration
The Positivity Cycle	Diversity and Inclusion

Exhibit 50: Dimension 2 Nurture Mini-Quads

Mentor

Reverse	Servant Leadership
Formal	Informal

Celebration

Time, Space and Budget	Scale
Recognition	Equity and Fairness

Driving Results	Happiness
It's HOW We Say It!	Emotional Intelligence

The Positivity Cycle

Policy	Awareness
Psychological Safety	Access

Diversity and Inclusion

Exhibit 51: Dimension 2 Nurture Micro-Quads

The Positivity Cycle Mini-Quads

We are frontline leaders working in Dimension 2, and Dimension 2 is all about collaboration. The positivity cycle is the opposite of a negativity cycle, which unfortunately is much more common, and therefore probably more familiar to most of us.

The negativity cycle usually begins with some minor dissatisfaction. We say 'minor' because if it were a major dissatisfaction, it would probably not go unnoticed. But it does go unnoticed because it is minor.

Because it goes unnoticed, it also remains unaddressed. And so, you have someone who is unhappy with work. They are not doing their best work because we all do our best work when we can focus on it, and being unhappy takes away some of our focus.

Maybe the person shows up unhappy at a meeting, and it shows. Or the quality of their work suffers, or they let their team down a bit. And someone eventually asks, "What's wrong? What's going on?" And the two employees talk, and now the dissatisfaction spreads and grows because the original issue is now perpetuating through the department along with a growing dissatisfaction with leadership for not addressing it in the first place.

If this goes unchecked, it can grow to the point where productivity slows substantially for a team or a department or even an entire organization! We are all familiar with this, everyone talks about the fact that if you do not resolve a conflict within a team, it will grow and spread, deteriorating team performance and morale until it is either resolved or failure occurs.

So that is the negativity cycle, and it has a cause and effect. We suggest that there is also a positivity cycle with its own cause and effect. The positivity cycle consists of happiness, engagement, and satisfaction. Satisfaction is something that we usually speak of as out of our hands as frontline leaders because, generally speaking, workplace satisfaction is related to things that we have limited influence over, such as compensation and benefits. However, in Dimension 2, our role grows with respect to all three areas.

Satisfaction is related to the conditions and environment that are generally created by the enterprise itself—that is to say, the senior management and the founders. So, at the frontline level and below that—the individual contributor or team member level—we tend to have little influence over this, other than input when we are asked.

But in Dimension 2, we are going to influence the working conditions in a positive way. When we see those improvements in working conditions are possible, we are going to take action. What the action is depends on the condition that we are trying to improve. Are there too many meetings? Is the building too hot? Is the space not equitably distributed, or does it make more sense to do it a different way?

For example, Dave worked for a company that decided to give everyone the advantage of the sunshine. They created cubicle space instead of offices, and there were no cubes on the outside walls. So, everyone could enjoy the beautiful views that were right outside the windows regardless of where they were seated. This was a great idea! And the managers that used to occupy the window offices understood the benefit and were onboard with the decision. Is it possible for you to work together with your colleagues at the frontline level to make changes that top management would not be thinking about? You know the conditions and how they affect your team. You know what you can influence by yourself, and you know your limitations. Surely there are impacts that can be made through collaboration.

Happiness and engagement are different stories. As frontline leaders, we know that we have a direct impact on both. In fact, as supervisors and leaders of people, we have more of an influence over engagement and therefore more responsibility associated with it. With respect to happiness, think about your supervisors in the past. Did they have an impact on your happiness? Long term or short term? Did that have an impact on your productivity? Your drive?

The answer is, yes it did and yes it does.

The Positivity Cycle Micro-Quads

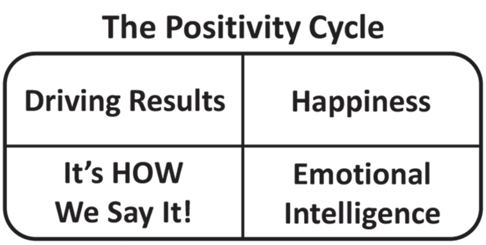

Exhibit 52: Dimension 2 The Positivity Cycle Micro-Quads

The micro-quads provide specific actions and options to help maintain a high level of morale and unity within the team.

It's *How* We Say It

We want to pay attention to all three areas of the positivity cycle: satisfaction, engagement, and happiness. In this section, we list some actions to help.

Well, that's what they say. What we say matters too, but how we say it matters a lot when we are trying to nurture as well as communicate. It's important to remember that how we say it only matters if what we are saying matters. But if what we are saying does matter, if we are truly communicating, then we want to be sure that our communications are received in the light in which they are intended. And so, the action is to pay attention to how you say it. There's a great book called *It's The Way You Say It: Becoming Articulate, Well-Spoken, and Clear* by Dr. Carol A. Fleming[62] that is well worth reading. Maybe twice.

One of the most misunderstood, misquoted, and misguided pieces of advice given is that we only understand 7 percent of a message because it is written. Lacking the advantage of verbal tonality, facial expressions, and body language, we miss 93 percent of communications if they come only in written form (according to The Mehrabian study[63]).

But this is not reasonable! There is no way that only 7 percent of our message is understood if it's in written form. That would render this work useless! So, let's think about our message, and understand that the emotions that are attached to our message will be those of the receiver. It's increasingly difficult to convey emotions without the advantages that personal contact offers.

Emotional Intelligence

Emotional Intelligence (EI) or Emotional Quotient (EQ)[64] is the ability to manage our own emotions and to understand the emotions that others are experiencing. The action is to constantly work to improve. We like to differentiate between skill and talent. Talent is natural; we don't have to work arduously to have it. Skill comes with practice. Talent plus skill is a winning combination that can create opportunities. Some people seem to be born with charisma. They charm. They please. They are—in a word—nice. Some people (sometimes those same charming people) are born to win. You know them. The people who seem to be able to do nothing wrong, or at least were destined for success. No matter what their chosen profession, they would be at the top of it. Sometimes it is that way. The Great

Leader syndrome, the "Leaders are born, not made" mantra. Of course, we're not with them. There may be people who were destined for greatness. There are certainly people who are born into great fortune.

But if you're more on the side of John Fogarty ("I ain't no fortunate son"[65]), your destiny may need some further shaping. And a great way to shape your own destiny is to improve your EI. It's a skill and can be improved with practice. What it means, in point of fact, is somehow not expressing anger when you are angry.

Driving Results

Drive results. Not people. We lead people, and we do that most effectively by serving them. We drive results; we do not drive people. However, we must never forget that as leaders in a business or enterprise, our job is to drive results, not just watch them happen. We are reporters, but we are not only reporters. So many project managers describe their jobs to us as one of reporting. This or that happened. But that's not our job. It's a small part of it, but if we do our jobs well, the reporting will not only be positive, but it will also take care of itself!

Happiness

Happiness is not a goal, it's not an endgame, it's a temporary state. To be happy, we must continuously work toward being happy and think about what will make us happy in the next moment. Of course, there are many different philosophical views of happiness. Socrates taught that happiness and virtue were integrated with one another[66] such that happiness could only be achieved through the doing of good works. And so the action here is to do good works and work toward doing good. And in the doing, happiness will be achieved.

You may have to provide solid business reasons for spending money and/or time on happiness. It can be difficult to invest in happiness because it takes people away from the value-add work that they are normally doing. However, there is plenty of data to support this investment.[67]

The Diversity and Inclusion Mini-Quads

Diversity and inclusion are important. There is no question that we may need to make extra effort to ensure that every team member feels that this is their place and that every individual feels free to express ideas without fear of recrimination in any form.

The Diversity and Inclusion Micro-Quads

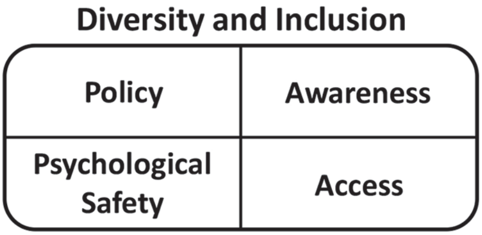

Exhibit 53: Dimension 2 Diversity and Inclusion Micro-Quads

Psychological Safety

The action is to understand everyone on the team. What is their background? What is their experience? What value do they bring to the team? Project and working environments can be intimidating, especially for new folks or people who aren't accustomed to working with the people with whom they are now working.

Environments that are rich with opportunities are also rich with competition, and unless we are careful and proactive in this area, we run the risk of losing good ideas that never get spoken because the people are intimidated.

Inclusion is much more than acceptance. It means ideas and people are respected. It's always important to remember that there is a reason that this is your team. You are where you are for a reason, and so are they. Therefore, every team member has value to bring, and it's extremely important that we gain insights from as many different perspectives as possible.

For example, when you are designing something that is going to be built, include the builders in the design process. We know of many environments where there is still an 'ivory tower' of engineering staffed with smart folks who went from high school to college to an engineering department. The people who best know how to build things are the people building them.

Access

Ensure that everyone has access to information and information systems and that they know how to use them. We are in an era of multiple generations in the workforce. That is to say, multi-technology-generations. Does everyone understand the applications that are going to be used? Is everyone on the same revision of the platform? Is it loaded up? Do we need to establish some protocols? Yes, we do!

Some examples of protocols include the following:

- Store client data in folders.
- Begin new strings for new conversations.
- Do not use 'reply all' unless appropriate.

Policy

Ensure that the policy for diversity and inclusion exists and is integrated into the culture. A policy of inclusion means that the team will be included in decision-making and that blame and finger-pointing are replaced by accountability and understanding.

Awareness

The action is to raise awareness of one another. To raise awareness of the achievements of your team as well as the teams of your colleagues. Radical transparency will help with this. And when you have walls and halls full of charts and diagrams, it's helpful to call attention to special achievements.

When goals are reached, make a splash on the chart so that people notice. Some people— the ones directly responsible for the success—will feel good about themselves. Others, such as senior management, may become accustomed to walking by quickly and only taking note of one or two numbers that are of particular significance to them. They may see your celebratory note and say, "Huh, what's this? Lisa's team has met their goals for three quarters in a row. Wow!" Or the cynical senior manager may think…hmmm, maybe we should look at those goals and raise those bars a bit.

The Mentor Mini-Quads

Mentoring is known to have a positive impact on both long- and short-term metrics.[68] Probably the most common reason for a lack of mentoring is that it takes time and effort. Also, it is a two-way street, meaning that it takes time and effort on the part of at least two individuals: the mentor and the mentee. There may be more than that involved. If part of the mentoring involves team sports or activities, the number of people involved increases. And as the number of people grows, the complication and complexity grows along with it.

The Mentor Micro-Quads

Mentor

Reverse	Servant Leadership
Formal	Informal

Exhibit 54: Dimension 2 Mentor Micro-Quads

Formal

A formal mentoring program is an excellent answer to the challenge of making time available. The return on investment (ROI) may be somewhat difficult to calculate but should be obvious and, again, considered in terms of both long- and short-term metrics. Mentoring helps people stay engaged—which leads to learning, which leads to new challenges, which leads to engagement, which leads to innovation. We have short-term results in project success, and long-term success in employee engagement and growth. As employees grow the company grows. A rising tide raises all the boats.[69]

Informal

Informal mentoring may be even more important than formal mentoring because it is more spontaneous. However, the environment has to be such that it is encouraged and welcomed. A person does not have to be at an organization long before they are going to appear to be senior to people who are new to the organization. Obviously, position, rank, title, are all related to this, but people who are more or less at the same level are going to look to other people at or above their level, who have been at the organization for a while, to determine what is acceptable here and what is not.

Therefore, it's important to understand that we are always conducting informal mentoring. Every time an associate asks a question or observes us performing a task, we are mentoring them in the ways of the organization.

Reverse

We met a school superintendent who told us she was going to be meeting her mentor. Her mentor in this case was a student who was going to show her the ins and outs of website development. He was going to teach her to create and manage her own Superintendent's Page on the school website. This is a form of reverse mentoring. It is when a more senior person (senior in position) is mentored by someone in a more junior position with specialized or new knowledge in a certain area. As Gandhi said, "Learn as if you will live forever." Never stop learning. We can learn something from everyone![70]

Servant Leadership

Servant leadership[71] is at the top of our list of favorite topics. We see servant leadership as an umbrella of leadership guidance. It fits over all leadership styles. Regardless of where we are on the authoritarian–collaborative continuum, we can apply the principles of servant leadership. No matter if we are in praise or discipline mode, we can do it in the spirit of servant leadership. There are entire books written on the topic, and we hope you'll read them. We also hope you'll allow us a bit of freedom on this topic, as we've not only read those books and studied the principles behind them, but we've also taught servant leadership from the beginning of our company, and we humbly try to live the principles of servant leadership every day.

So, what are those principles?

- Lead through service, become a servant leader.
- Help others to become servant leaders.
- Teach people to share the principles of servant leadership.

Here is how we apply servant leadership:

- We want you to be better off as a result of our interactions.
- We want to learn together with you.
- We want you to want to learn more about and practice servant leadership.
- We want you to teach others about servant leadership.
- We want to make the world a better place by helping others in small ways.
- We hope you will spread happiness.
- We want you to be successful!

The Celebration Mini-Quads

Working on celebrations in Dimension 2 means working with our colleagues at all levels of middle management to make things happen. These are multi-team celebrations, opportunities to let the entire organization know what you've been up to. The possibilities are endless when this particular group of people comes together. And if they actually form a team among themselves, with goals and objectives, they will be unstoppable!

The Celebration Micro-Quads

Celebration

Time, Space and Budget	Scale
Recognition	Equity and Fairness

Exhibit 55: Dimension 2 Celebration Micro-Quads

Recognition

Be sure that everyone is included. Dave, coming from the engineering side of life, has seen a view of this where the business side of the organization gets all the glory and credit. It is similar to his experience in the marching band in high school. The band was good, and won many competitions around the state, including first place at a state-wide competition! The football team lost that week. On the following Monday during morning announcements, much credit was given to the football players for their outstanding efforts. Not one word was spoken about the band.

Equity and Fairness

Dave doesn't want to be specific in this book because the people are still around. Hopefully, they've changed in the time since this took place, but he has personally witnessed award ceremonies that focused on sales and marketing and pretty much left the technical side out.

The problem (according to Dave's analysis) is that the business side brings money in, and the technical side is an expense. Also, if you've ever been a part of making a sale...well...it's just plain exciting. And the sales team stays excited, all the time. Then you have the techies over on the other side of the room, the money spenders.

Often, they are contrasted with the business folks as clearly as the marching band contrasts with the players on the field. Different uniforms, attitudes, expressions. Different things turn them on.

But there are more differences. The sales team is seen as doing magic every time they make a deal. The engineering team is actually performing magic all the time, but they are seen as just doing their job. And why is this? Because the people at the top of the company are usually businesspeople.

That's not always true. There are a lot of companies with technical people at the top, but let's face it, they got there by learning business! And they get excited when there are sales. We all do.

So, let's not forget to be fair and equitable when it comes to recognition and rewards. Everyone does the best job they can, and they are there for a reason. They belong there, so let's celebrate everyone.

Time, Space, and Budget

Budget almost always gets the first consideration when it comes to celebration—especially cutting it. Your action is to ensure that you have the budget first. Put it aside as early as possible in the project. It may be difficult at times to not use it as contingency, and in the end, you may have to do so. Of course, if your celebration budget is chewed up by risk contingency, you may have less to celebrate, so let's not have that happen! Celebrations are part of the success; they help keep folks interested and motivated. Celebrations are fun. People like them. You've got to make the time for them.

Scale

It is important to consider the scale of celebration. Team building can be anything from a fifteen-minute pizza-eating, problem-solving session to a day or more that involves travel and major expenses.

Consider your goal. When we are talking about the major events involving considerable expense and investment of time, we are usually talking about some sort of reward. However, it should also, and perhaps even more fundamentally, serve as motivation toward action and goals that you and the teams want to achieve. So, the actions are to remember the goal and develop your celebrations and activities in a way that is both rewarding and motivational.


3

Dimension 3: Strategy

DIMENSION 3 IS THE strategic dimension. We are frontline leaders, supervisors, project managers, and team leaders. We envision ourselves wandering around the matrix, and we've stepped off the elevator onto the third floor. This is the land of senior management. Window offices with tended plants, hardwood desks, and carefully arranged bookshelves, many of which don't have books on the shelves. Imagine that! (Back in Dave and Lisa's office, the bookshelf is overstuffed with books and notebooks of every sort.) How do people run the entire organization and stay so neat! There are carpeted floors and thick doors, and it's an intimidating environment.

It is not intended to be that way. It's intended to be comfortable for the people working there. But it *is* intimidating for many of us. It may not be easy to speak. Do not enter this territory (this part of the matrix) unprepared. The CEO sits here. What if she passes you in the hallway and asks about your project? Or asks who you are? Or asks if she can help you? What will you say?

Well, in any case, this is our chance. These people can, and do, make differences in the organization that have broad impacts. That means that if we can have an impact on them, we can make a difference that counts! Of course, in that intimidating environment, you're going to need some help, and that's why we created Dimension 3 of *The Engagement Matrix*. It's a tool to help you navigate the deep and heady waters of senior management from your position at a level in the organization that is...well...*not* senior management.

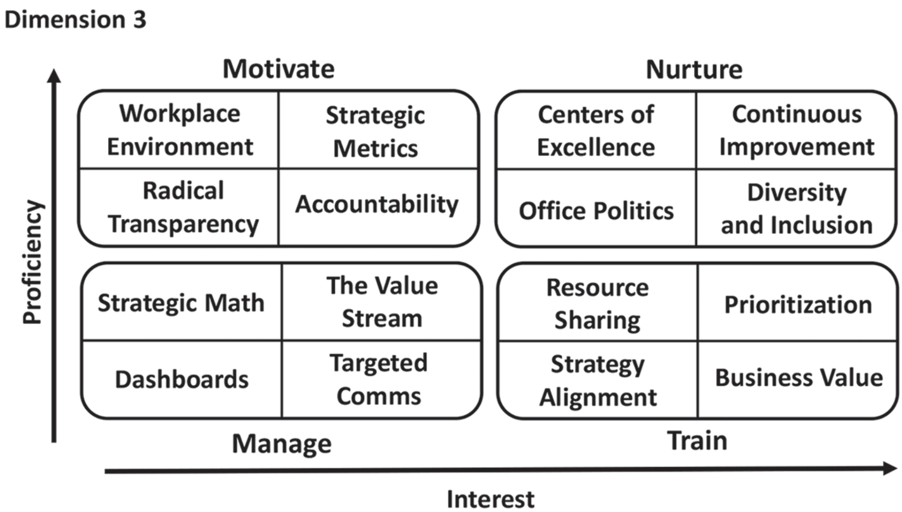

Exhibit 56: Dimension 3 Mini-Quads

The Manage Quadrant

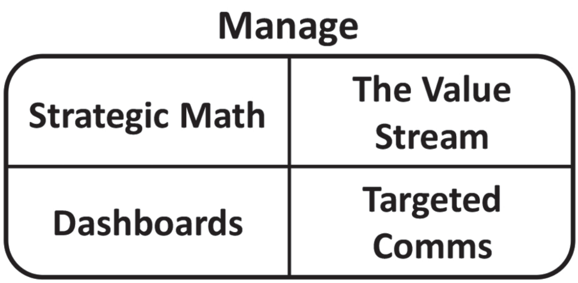

Exhibit 57: Dimension 3 Manage Mini-Quads

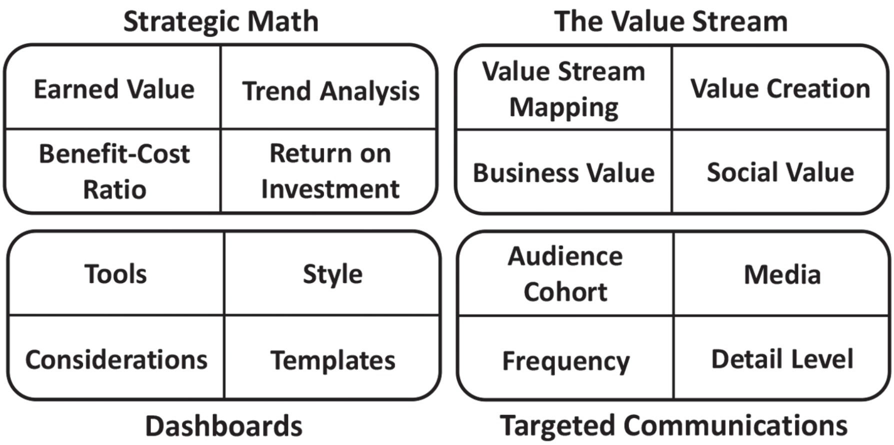

Exhibit 58: Dimension 3 Manage Micro-Quads

The Dashboards Mini-Quads

Dashboards have become the preferred method for conveying information quickly and effectively and for good reasons. First, they represent the best that technology has to offer by combining the data collection and storage capabilities of computers with the ability to update graphical images in real time.

The word 'dashboard' has its origins in the concept of protection. It was a board that protected the driver from rocks (and other debris) that was 'dashed up' by horses' hooves.[72]

The Dashboards Micro-Quads

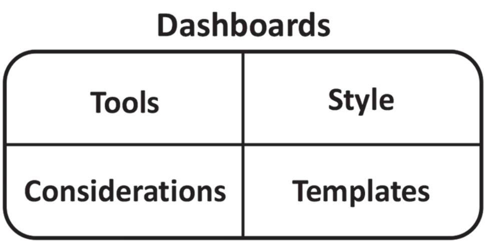

Exhibit 59: Dimension 3 Dashboards Micro-Quads

Considerations

- What are we responsible for reporting?
- What decisions will be made based on the dashboard information?
- Who will use the dashboard?

Data is abundant, but not genuinely informative, with no context. Information is derived through additional data that adds context—for example, who, what, when, etc. Data and information are often objective. Knowledge is information plus experience, which may come from formal educational or from work and life. Knowledge is subjective because different people have different experiences. Knowledge plus action equals wisdom. Wisdom determines what we do or do not do. Wisdom is subjective because it depends on our interpretation of prior knowledge.

Data/Information/Knowledge are established in the past. Wisdom is forward looking. Each tier up increases in value. As you move down, each tier has less value. Where is your place in the Date/Information/Knowledge/Wisdom model?[73] It depends on your role and on who is depending on you. Note: this is an example of a simple graphic model.

Templates

There are many templates available which can be found in detail in our reference material.[74]

Tools

What is a tool as opposed to a template? Well, tools can be used to build templates. While a template can be a great way to get started, we should be careful that the template does not limit our creativity. A more basic tool may enable more flexibility in the creation of your dashboard.

Style

When you're selling to senior management, it's always safest to be branded in their image. Don't mess this up! Don't make the deadly mistake of using an obsolete corporate logo or slogan. Do your research and be sure you know the latest and greatest marketing that the visionary leaders of your organization are paying attention to and brand accordingly.

The Targeted Communications Mini-Quads

In the Manage Quadrant of Dimension 3, we may recognize that there is low proficiency in a topic of high interest to us. After all, everyone at the top of the organization has their own specialty. We cannot expect them to be a specialist in everything. We need them to be an expert in their field. When we recognize low proficiency in a topic in which we'd like to educate them, it's going to be important to understand their interest level.

Finding a senior-level advocate for our ideas can make a difference. Some ideas move forward, and others never see the light of day. We target our communications to those who will be most interested in a positive way.

The Targeted Communications Micro-Quads

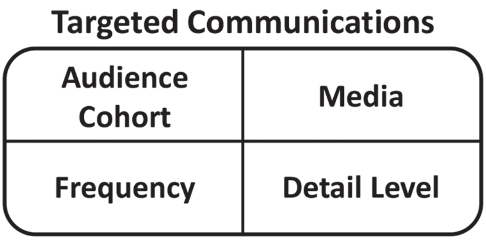

Exhibit 60: Dimension 3 Targeted Communications Micro-Quads

Frequency

The frequency of our communications at this level is probably out of our control. Therefore, the right time to plan for an interaction with senior management is right after you finish an interaction with them. If you had a meeting this morning with an executive, begin planning now for the next engagement or interaction. If you've never interacted with senior management, begin preparing now for your first engagement or interaction with them.

Detail Level

The detail level must be suited to the audience. The best approach here is to begin at a high level and be ready to dig into details if necessary. As you dig for details, watch for reactions. Be careful about zooming in exclusively on favorable responses. You need to watch the whole room and gauge all reactions. Do not bore them with details if they don't want them. On the other hand, be prepared with details if asked. For more information on how to present to senior management, watch *Shark Tank*![75]

Audience Cohort

A cohort is a group of similarly interested people. Of course, their collective interest may not be aligned with yours, and so once again, doing the work, the due diligence, the homework, is going to be supremely important when trying to influence this level of an organization.

Media

Thinking about the media you are going to use is as important as the content itself. Consider sustainability, cost, time, and so forth. All these things will be occurring to your audience and so be certain that the media you use is compatible with their standards and expectations.

The Strategic Math Mini-Quads

We think it's good strategy to know some math. There are many who disagree, perhaps you may not need this section. There are plenty of managers out there who successfully navigate a career without ever understanding much about the math.

We have computers and calculators which renders math the equivalent of an engine. We can get in a car and start it up without ever thinking about how or why it works. Until it doesn't. Even then we don't look for a tool to fix it. Most of us look for the number to call.

We encourage you to at least understand the principles of the math. To quote our friend and mentor Carl Pritchard,[76] you need to understand "the language of the math." In fact, if you categorically want to understand project management math, do some of the challenging problems in his *Drill Book*![77]

It's always useful to remember that we don't know what we don't know. So many of us get by using the tools we have and the methods we know, but that doesn't mean those are the best tools and the most effective methods. And "getting by" is not our goal.

This simple fact often gets lost in the complexity of the day-to-day management of projects. It is even treated as irrelevant in some environments. This is especially true of projects that do not have a financial ROI, projects that have intangible or non-monetary benefits, and projects that are financially sponsored from outside the organization.

We have on many occasions experienced project managers who told us that they are not required to manage their budget and therefore do not manage it. In some cases, the project work will either go on or not go on depending on the funding source. This can be related to almost anything ranging from elected politics to the whims of a billionaire.

But that doesn't mean that managing our resources, including budget, is irrelevant. If continuous improvement is our goal, then we need to understand our baseline and measurement methods. We need to understand a bit about how the engine works. It is also advantageous to understand what tools and methods are available and the benefits (and costs) associated with them.

The Strategic Math Micro-Quads

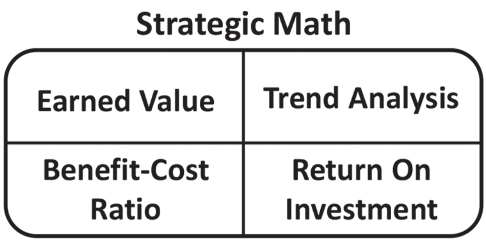

Exhibit 61: Dimension 3 Strategic Math Micro-Quads

Benefit-Cost Ratio

The Benefit-Cost Ratio (BCR)[78] is as simple as it sounds—the ratio of the benefits of a project or an investment to the cost of the project or investment—the benefits divided by the cost. The reason for using it is that the benefits and costs for various projects or investments are likely to be unevenly distributed over varying time periods. Using this ratio allows a side-by-side comparison of investments.

ROI

The ROI is the actual calculated return on an investment, as opposed to the BCR previously discussed, which represents the future anticipated return.[79]

Earned Value

Earned value is project management magic. Using the simple formulas that you find in the references, you can determine the precise status of more complex projects.[80]

Trend Analysis

By using trend analysis as a strategic measure, we can forecast financial needs.[81]

The Value Stream Mini-Quads

We cannot talk about value stream without mentioning Al Shalloway and Dr. Russell Ackoff.[82] You can learn a little about value stream management on YouTube, and you can learn a lot by following the Disciplined Agile certification path all the way to Value Stream Consultant.

In the meantime, we promised you an action, and the action here is for you to understand the terminology and the philosophy of value stream management.[83]

The Value Stream Micro-Quads

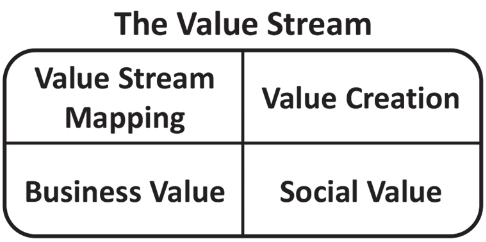

Exhibit 62: Dimension 3 The Value Stream Micro-Quads

Business Value

Action: Determine what is of value to the business enterprise, and then determine how you and your team can support and enhance that business value.

Social Value

Answer the following questions: What social value does your team bring to the enterprise? What social value does the enterprise bring to the community? Seek to enhance social value at every opportunity.

Value Stream Mapping

Value stream mapping is an extremely useful tool in helping teams understand the flow of information or value as it traverses an organization. Eliminating delay in the value stream is a lean approach to decreasing lead times.[84]

Value Creation

Determining what is of value is the first step. Creating value follows. How can you and your team help your organization create value for its stakeholders, customers, and end users?

The Train Quadrant

Training in Dimension 3 means training those around us in the principles of shared power and responsibilities.

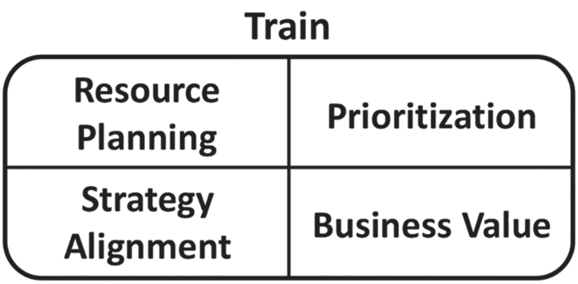

Exhibit 63: Dimension 3 Train Mini-Quads

The principles of servant leadership will be extremely valuable as your colleagues come to recognize you as a leader among leaders—one whom senior management recognizes and respects, one who has a positive attitude toward change, and one who knows how to lead a winning team and shine the spotlight on them as they achieve each success.

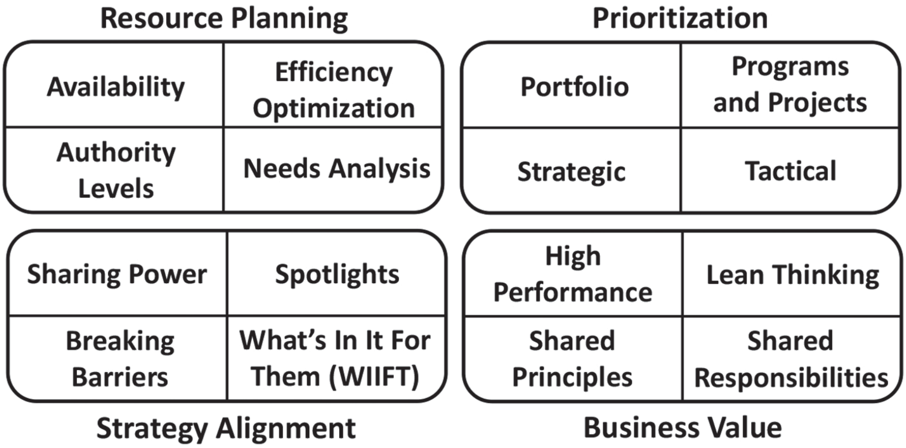

Exhibit 64: Dimension 3 Train Micro-Quads

The Strategy Alignment Mini-Quads

In this section, we will explore the attributes and actions available in the Strategy Alignment mini-quadrant.

The Strategy Alignment Micro-Quads

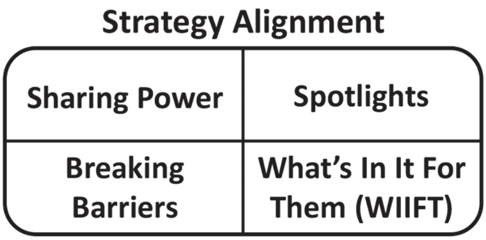

Exhibit 65: Dimension 3 Strategy Alignment Micro-Quads

Breaking Barriers

If you are in a siloed organization, then you will have to first learn what the barriers are. Why do people not want to communicate or share information? In the absolute worst case of this, Dave actually experienced a team leader who told him specifically to not tell anyone how he did things.

Dave was working at Raytheon as an NC programmer, and the programs were stored on mylar tape when they were released to production. But when they were prototyping, they would use paper tape because it was a lot cheaper, and they made a lot of mistakes. Well, Dave's supervisor showed him a way to quickly edit the paper tapes to make them ready for production, a fast method that put him way out in front of others. So much so that the boss proudly proclaimed him as the expert in this art. As you can imagine, he remained the expert in that art while the world around him left that art behind. Replaced by technology, the value of his skill was greatly diminished.

What's In It For Them (WIIFT)

One of the best barrier-breaking tools out there is the WIIFT. Why should your colleagues cooperate with you? Try to see it from their perspective. We refer to this as managing up and down the value stream. Each supervisor, manager, and front-line leader should look at the fringes of their operations—the interaction points, the touch points—where there is an exchange between your team and other teams or individuals.

What would make the interaction easier for the others? You and your team know what would make it easier for you. That is what people talk about all the time. If only they would do this or that. If only they knew what I had to deal with.

Well, they do not. And they might not care. They are too busy dealing with those same inward-looking questions. But imagine if each person in the chain were focused not on themselves but on those around them. The questions would change. How can we make it easier to input work or information into our department? How can we make it easier for those who must receive our outputs to take them in? How can we be sure there are no errors leaving our department? How can we make it easier to eliminate errors on the incoming side?

Basically, the question becomes, how can we help each other? If every department manager and frontline leader focused on that one question, many organizational problems would be eliminated.

Sharing Power

Our advice here is to be sure that you are truly sharing power. After all, we don't want to be so naïve as to think that competition and office politics will simply go away or not exist in the first place. Both of these are likely to exist. Dave experienced the merging of departments, and the three supervisors knew that senior management was looking outside for a director. The three went to management and suggested that one of them become the director. In the private pre-meetings, it was discussed in a power-sharing context. The three supervisors would share responsibility equally and one of them would carry the Director title. Of course, in hindsight, it seems obvious what was going to happen. The person who was promoted to director immediately gained access to that level of the company and used it to his political advantage. Yes, he took advantage of his colleagues. Don't let people play you. Sharing knowledge freely and openly will demonstrate your willingness to collaborate and encourage others to do the same.

Spotlights

As you share power, share the spotlight. Be certain that you are co-presenting. Be sure that you all give your teams credit. By your team winning, you will win. Management will see that you are the leader of a team that is meeting its objectives. By shining the spotlight on your teams, and the teams of your colleagues, you will gain a positive reflection on your leadership.

The Business Value Mini-Quads

In this section, we will explore the attributes and actions available in the Business Value mini-quadrant.

The Business Value Micro-Quads

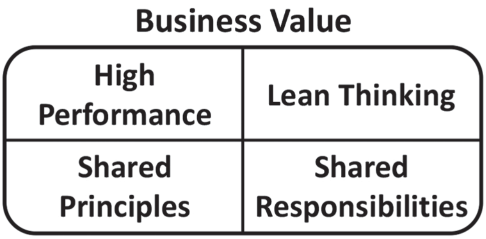

Exhibit 66: Dimension 3 Business Value Micro-Quads

Shared Principles

The action is to ensure that everyone understands what the shared principles are, and more importantly, that they have them. It may be useful to understand how or why things break down to understand how we may be able to contribute most effectively to building them up. At first glance it is difficult to understand how we may have unshared principles within an organization. After all, wasn't the organization built around shared values and principles? These shared principles can become lost as they are splintered and split apart among teams who are competing with one another for praise or glory, or perhaps more compellingly, competing for limited resources that could be in budget money, people, or even time.

Shared Responsibilities

Training in Dimension 3 tends to be a more sensitive area requiring excellent persuasive and listening skills. We are not trying to teach the principles of shared responsibilities—your senior management probably already sees the responsibility as shared. However, many organizations are frustrated by late projects.

While Dave was learning leadership in a competitive organization, it was easy to see the fallacy in the thinking, but it was only easy to see from the bottom up. It is also easy to understand the perspective of senior management, which is that if I trust my staff and I have the problem of three separate projects, I challenge the frontline leadership with the issue. They enter a competition with one another to each get their projects finished.

We were in the era of precise project planning and then excellent execution. Focus on creating a detailed plan that would tell us exactly when we were off-track. The plan would account for uncertainty and risk through the use of contingency. This was the standard practice of the era, so we don't fault anyone for using this method. However, in hindsight, we can see the fallacy clearly.

We would have three projects precisely planned. We'll even give credit for excellent planning, including accounting for both known and unknown unknowns as well as the realities of daily life. We had plans that in Microsoft Project, spreadsheets were thousands of lines long, and the projects were planned to be several months in duration with investments in the low millions.

There are, naturally, limited resources within an organization. Even if you are allowed to "create requisitions" and hire new employees, there is a limited budget. Of course, there are exceptions to this, but usually resources are limited.

In a siloed organization, each manager does their best to carry their work forward and achieve success. While this is not necessarily done at the expense of others, at least not consciously, it stands to reason that if there are limited resources and those limits are below the combined needs of the projects, something is going to fail.

Then the domino effect happens, which leads us into a cycle of failure. Let's not go there. Let's prevent that from happening in the first place by understanding our shared responsibilities and our shared commitment to organizational goals.

Here is how it works, and this is your action: teach this to as many people as you can. Begin with a single advocate—the more senior the better—but this principle is at the root of many organizational evils.

High Performance

We have three projects: A, B, and C. Each is carefully planned, and each is going to be nine months long. There are shared resources—people who are working on more than one of the projects with some folks having assignments on all three.

It is an easily recognizable fact that if a person works on one project, rather than two or three, their efficiency, productivity, and engagement increase and improve.[85] Another easily recognizable fact is that many projects are late. What is the on-time performance in your company? How about for your team?

We had a client who asked us if we could help them with their on-time performance. We asked what it was now, and they said one hundred percent! We were surprised. We asked if that meant all their projects met their deadlines all the time, and they confirmed. We asked if, as part of our discovery process, we could speak with the employees without the CEO on the line. He agreed and assured us we would get the same responses.

As you may have guessed, the answers were different. Upon further discussion with the employees, it turned out that they did deliver something on time but usually had to go back and fix things or complete things that were not done by the deadline.

Our point is, it's important to baseline your metrics in any area that you want to manage.

Back to the three projects, we must understand that all three projects are going to be late because of the shared resources. But to effectively solve the problem, we need to serialize, or at least prioritize the projects and minimize the movement of resources between them.

If the company is depending on frontline leadership to accomplish this, then the metrics and rewards need to support that goal. Otherwise, each project manager or leader will continue to lobby for their project to be the priority. Or worse, if they are competing for resources, they could unintentionally sabotage one another by not sharing resources.

So, from an organizational perspective it makes sense to prioritize and minimize resource sharing, or at least, resource interruption and movement from project to project.

Lean Thinking

Lean thinking, simply put, means cutting fat. The reference dates back to a book called *The Machine That Changed the World*, which is about the Toyota Production System.[86]

Basically, the Japanese automakers studied the US manufacturing processes and then improved upon them by applying the principles of lean thinking:

- Build quality in
- Design waste out

Of course, to do these things, one must determine the correct balance between the cost of quality and ROI.[87] To build quality into a process or product requires investment in time and money and plenty of forethought.

In order to design waste out, it is necessary to define waste. Waste is defined in lean as follows:

- Muri
- Muda
- Mura[88]

Depending on the size and nature of your organization, the maturity of each of these concepts will impact your project in different ways.

For example, a company that has a high degree of automated testing will have a priority of having test engineers present at concept meetings and throughout project development, whereas a traditional project team may utilize the test function of the organization to build out tests per requirements. Two different approaches, each valid for the environment for which it was intended.

The Resource Planning Mini-Quads

Frontline leaders working on resource planning in Dimension 3 means that we are working with at least one member of senior management as well as other members of the management team to determine the optimal resource loading for the organization.

The Resource Planning Micro-Quads

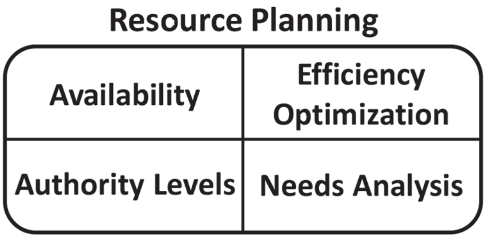

Exhibit 67: Dimension 3 Resource Planning Micro-Quads

Authority Levels

When working with *The Engagement Matrix*, it is important to remember where we are in the matrix, who we are, and the role we are in and the situation we face as we look to improve working conditions and results.

In this case, we are a project manager or frontline leader separated from senior management by at least one level, and probably more. To complicate it further, we are in a matrix organization in which there are power struggles between the siloes that are each managed by different senior managers. Most organizations are hierarchies; therefore, no matter how hard we try to level the authority and empower teams, a hierarchy tends to create competition at some level.

In Dimension 3, we are working to make an impact at the most senior level, which in most cases will be the strategic level of the enterprise. This is the level at which strategic decisions are being made. In the training quadrant of Dimension 3, we are impacting the organization through learning opportunities.

Operating in Dimension 3 means that we have exposure, if not actual access, to senior-level authority—the power to impose change broadly. Just as a reminder, we are not suggesting that you would violate a process or go around your managerial hierarchy (except in the case of whistleblowing).[89]

We are suggesting that through constant preparation and networking, you will find moments or opportunities to educate. You may be learning new things every day about frontline leadership of which your senior leadership is not aware. They learned their method of leadership and have applied it successfully. We have much to learn from them, and they in turn have much to learn from us. They may or may not, however, be open to that.

That's where the constant preparation and networking comes in. Every chance you get to answer a question or give credit to your team or present on a topic is an opportunity to impress someone. You need to be taken seriously in order to have an impact at the senior level.

We should take a moment to talk about what we do and what we do not mean by networking. Networking is about getting to know people and how you can work together to meet the needs of all stakeholders. Networking is not about direct sales or asking favors. It is not about you. It is not about them either. It is about *us*. And our stakeholders—our teams, our management, our clients, customers, end users, and the stakeholder community at large—is impacted in some way by the results of our work or by the doing of the work itself.

Through networking you will find advocates for your ideas. They may be at any level of management, and you may find different advocates for different ideas.

The following are great ways to begin conversations in this context:

- We've done something that I think you will be interested in.
- My team developed some information based on data.
- We ran a small pilot experiment in our team, and I think you'll like the results.

The following are *not* great ways to begin conversation in this context:

- May I have some of your time (without asking for anything or offering to give something)?
- If only I had funding for this project I would x (this is complaining or begging).
- This place would be a lot better off if *x* (the status quo came from someone or somewhere—this is offensive to the people who have been there and will put them on the defensive such that your idea will never be heard, even if you're allowed to say it).

Once we have the ear of a senior manager or the opportunity to make a presentation, we have to make it count. Change at this level may be difficult, and we may not understand where or why we are getting resistance because we may not be privy to the office politics at that level.

In any case, we want to demonstrate that results will be improved through the application of your idea. We know that there is a direct correlation between results and focus.[90] The more we can allow people to focus, the better the overall results.

However, this may require attention to long-term results that are not relevant to the audience. In other words, if a senior manager is rewarded based on short-term results, and longer-term results, such as employee engagement and retention are not part of their compensation structure, then they are not going to be easily swayed by the argument that delaying one project in favor of another is a good move. They need short-term results.

Therefore, we must sell our ideas in terms that are relevant to the audience. If the focus of the audience is on short-term results, you are in luck! Short-term results are the domain of the project manager! Now you are on familiar turf.

For each individual project, it is easy to understand and well-documented that a focused (dedicated) project team is advantageous and will lead to improved project results.

It follows logically that if each individual project has improved results by having a dedicated project team, then a company full of dedicated project teams will have better outcomes than a matrix organization sharing resources across projects.

There are exceptions often involving people whose skills are a smaller part of every project. A smaller role does not mean less important. Every piece, every player, is equally valuable. You may have technical writers, or testers, or other subject matter experts who are not part of your core team.

The core team, however, is a long-standing team. This means they will not encounter the initial stages of team development (forming-storming-norming) on every project. Rather, they will establish themselves as a team, and then the company will run projects through the team.

Needs Analysis

A needs assessment[91] will reveal the gaps between the available resources and the current and future needs of the organization. Having the strategic view of the organization enables the planner to prioritize resources across the organization.

The issue is that if the scheduling at this level is done in too much detail, we are back at the problem of comparing humans to machines. Scheduling a person to switch from project A to B to C every day is the least effective way to get all three projects done.

Therefore, at this level, it is imperative that prioritization at the portfolio or program level be accomplished.

Availability

High interest and low proficiency calls for training of senior management by middle management on why you need to change the availability of resources to projects, and this change must be made at the senior level of the organization.

Efficiency Optimization

We like this particular combination of words because we don't often see them together. People often talk about efficiency in terms of maximizing it, being as efficient as possible. Optimization is often the preferred term when referring to human resources. However, in many cases, resource optimization is more precisely referring to efficiency maximization.

Resource optimization usually refers to either smoothing or leveling, two accepted project management practices.[92] While these methods are effective when used correctly in the right environment and situation, here we are talking about the efficiency optimization of the organization. This means that we need to focus on the long-term as well as short-term metrics. Short-term metrics, such as on-time and on-budget performance, tend to be localized metrics. They do not always roll up uniformly in a way that integrates well into system-level, organizational metrics, or long-term metrics.[93] In other words, how does a project being late or early impact employee retention? How does a project budget impact employee engagement? Is Net Promoter Score (NPS)[94] impacted by project performance?

The answer is yes. The answer is that the impact is major in all areas. This is easy to prove by taking it to extremes. What if all projects fail? Will employee engagement, retention, and NPS be impacted? What if all projects and products are extremely successful? Will employee engagement, retention, NPS and the overall financial health of a business be impacted?

The Prioritization Mini-Quads

In this section, we will explore the attributes and actions available in the Prioritization mini-quadrant.

The Prioritization Micro-Quads

Prioritization

Portfolio	**Programs and Projects**
Strategic	**Tactical**

Exhibit 68: Dimension 3 Prioritization Micro-Quads

Strategic

When we are in the "train" quadrant of any dimension, it is defined as an area of Low Proficiency and High Interest. When we are in any area of Dimension 3, we must understand that we are referring to low proficiency as measured by the enterprise itself with respect to its own stated goals and objectives.

Strategic prioritization is often not seen or understood at lower levels of the organization. This may be done intentionally for security reasons or other business conditions that require confidentiality. However, in the absence of clarity and transparency, the implementation of tactical objectives may actually interfere with the achievement of strategic goals, or vice versa.

Our action is to understand, to the best of our ability, the strategic priorities of the organization and then ensure that our project objectives and performance metrics are aligned with them.

Tactical

Creating tactical objectives together with members of the strategic team or senior management can boost the ability to achieve those goals because the direct relationship between strategic goals and the implementation plans will be well understood by all stakeholders.

Portfolio

Portfolio management is needed to support the strategic vision and is often the organizational tool used to categorize projects resulting in separate teams working on separate missions. Our action is to understand how the portfolio management structure impacts the resources available for projects and the sharing between projects that is required.

Programs and Projects

The strategic view of programs and projects can be helpful in understanding the optimal resource-sharing plan. There are several options available including:

- specialized teams for specific tasks;
- subject matter experts needed on a part-time basis for each project;
- people with special skills; and
- multi-tasking individuals to multiple projects.

Let's talk about that last one because it's the worst option, but the one most often seen in use in organizations. This is the action for us, and it's a primary reason for creating Dimension 3. How can we find ways to engage with the strategic levels of the organization to influence the resource-sharing structure in order to minimize the multiple-tasking of individuals? Use your power skills, find a senior level advocate, and work with them to find the compromise between strategic priorities, tactical objectives, and available resources.

The Motivate Quadrant

In this quadrant we are talking about motivating senior staff to approve and support changes at lower levels of the organization.

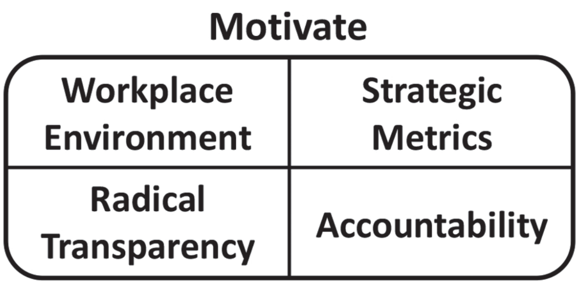

Exhibit 69: Dimension 3 Motivate Mini-Quads

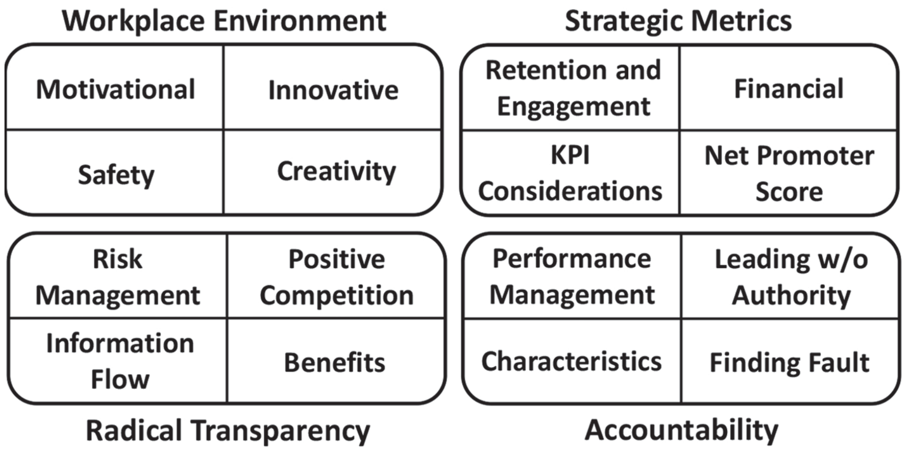

Exhibit 70: Dimension 3 Motivate Micro-Quad

The Radical Transparency Mini-Quads

The guidance in this section will help you attain your goal of fundamental change. That is what radical transparency really is—changing the core of communication so that the organization takes on a culture of transparency and openness.

The Radical Transparency Micro-Quads

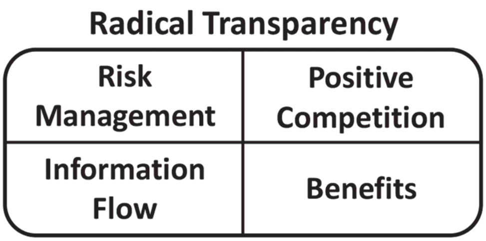

Exhibit 71: Dimension 3 Radical Transparency Micro-Quads

Information Flow

How, and how well, does information flow now? Why do you want to propose a change or a new process? Be sure that you can articulate and demonstrate the benefits of any improvement that you propose. This is one of those things that is simple, perhaps, but not necessarily easy. Remember that we are looking at this from the perspective of a frontline leader.

Perhaps we may have learned a new method of communication that we believe is worthy of senior leadership attention. From their perspective, the information flow is fine.[95] The way things are may be working well for them. They are getting what they need when they need it. That means that even though there may be a better way, some senior leaders may be resistant because any change could mean that they will no longer be getting what they need, when they need it.

Of course, your intention is that would not change, and in fact, would improve. However, that is a risk. We cannot predict with one hundred percent certainty that they are wrong! Any new process that we implement or attempt to implement comes with risk.

We can take precautions to offset this uncertainty:

- Implement change in small doses if possible.
- Keep a backup system in place to ensure continued integrity of information flow.
- Garner a senior-level advocate to help overcome obstacles.

Benefits

You may have to specifically point out the benefits of radical transparency, especially if there is resistance as we've described. It is important to baseline your information. What information is currently available, to whom, and on what timeframe? What are the security concerns? What other concerns are there?

Here is a great question to ask while we're addressing risk: What is the current system missing?

In fact, that's the big question because the answer to that is the reason that we are proposing a change in the first place. Something in the information flow can be changed to the benefit of the organization. Of course, it is a benefit to your team. But that is not what will sway senior management. This is the enterprise level! How does this change impact the organization? How will it improve overall efficiency or other business metrics?

Improving the information flow should prove in and of itself to be motivational to senior management because the benefits are well-documented.[96] However, for the

C-suite residents to appreciate the improvement, they'll have to know the improvement that happened and the positive business impact it had. That means that we must baseline the effectiveness of our information flow before the improvement takes place and then measure and report on the improvement itself.

If this doesn't happen, then it's likely that the improvement we've implemented, or at least instigated, will be negated or overrun by other events and programs and rendered ineffective.

Risk Management

We must be ready to manage the risks associated with radical transparency. While information flow is usually considered to be a good thing, the information that flows isn't necessarily what people want to hear. It may also be used against you.

We need to understand that we are living and working in the real world. Even in the most fair and equitable environment, we are likely to find competitive people who may take advantage of your less-than-glowing information in a particular report. When the information is available to everyone, it's all out there: the good, the bad, and the ugly.

Open discussion, debate, and discourse is the recommended response. The reason that we are reporting our metrics is not out of a sense of competition with one another but rather to engender and embrace a collaborative culture. When frontline leaders help one another and work together to solve problems, the organization reaps the benefits.

Applying risk management at this level for a frontline leader means using the tools that we have available and are familiar to us. The first tool that we reach for as we begin our qualitative assessment of the risk is the Probability and the Impact table. (See Exhibit 72.)

What is the likelihood of resistance to your idea? What risks or perceived risks does it entail for others in the organization? And what will be the impact of the risk on your concept of radical transparency?

As you think this through, try to identify different sources of risk. Think of the negatives, both real and perceived. How will you overcome those objections? How will you turn the arguments into positives?

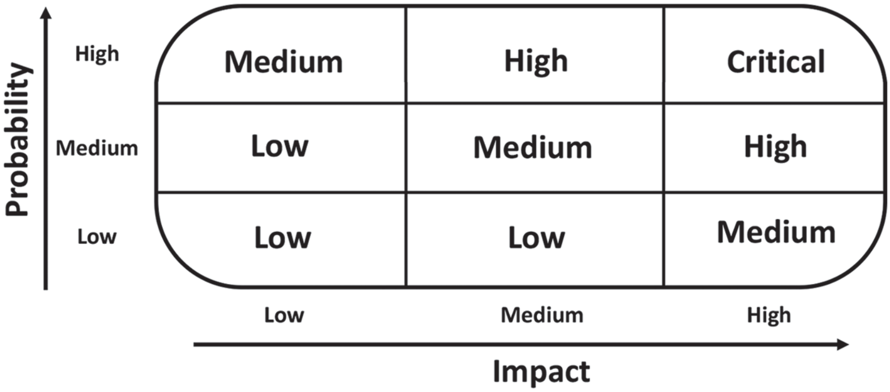

Exhibit 72: Probability and Impact

Positive Competition

Competition within organizations is common and often seen as healthy, especially by top management. They know that the right amount of competitive tension is healthy for productivity. We don't disagree with this concept, as long as it truly is healthy competition. One example of positive competition would be for department managers to compete with respect to getting the information out. Whose dashboards are always complete? Whose timesheets are always done on time!

The Accountability Mini-Quads

In this section, we will explore the attributes and actions available in the Accountability mini-quadrant.

The Accountability Micro-Quads

Exhibit 73: Dimension 3 Accountability Micro-Quads

Characteristics

Accountability in any dimension begins with an examination of oneself. Before we can attempt to motivate anyone else to be accountable, we must first be motivated to hold ourselves accountable.

Here we are dealing with the strategic levels of the organization. This is the level at which accountability truly exists. Responsibility for tasks and assignments, even for entire areas of the organization, can be delegated. Ultimately, the executive level of the organization is held accountable to results.

The action in this micro-quad is to identify the characteristics of accountability that exist within our environment so that we can ensure that our goals are aligned and more easily integrate the results of potential proposals into areas that matter to senior management.

Finding Fault

Based on our micro-location within the matrix, we are experiencing a fairly high degree of interest in accountability, and we would like to, from our position lower down in the hierarchy, motivate a higher degree of accountability.

The action for us is to determine the fault-finding mode. Is it about people or about things such as processes and standard operating procedures? In an accountable organization, we will first look at what went wrong instead of who did something wrong. Look for faults in the system, not in the people.

Performance Management

Performance management is one of the topics that's a bit strange to discuss from this perspective. We are frontline leaders or middle managers dealing with the highest levels of the organization. What are our actions, or more precisely, what options are available to us, with respect to performance management? We do not manage their performance, in fact, they manage ours!

Remembering that we are in the Motivate Quadrant of Dimension 3, in general, there is a high degree of proficiency around performance management and a low degree of interest in changing the way things are done now.

Clearly that disagrees with our perspective because the reason we are here in the matrix is because we have found an area that we believe could be improved through senior management intervention.

Again, our action is to first learn and then act. Learn the current performance management system inside and out, and be sure we understand how well and in what ways the system ensures alignment between behaviors, performance, and strategic objectives.

Once any potential gaps between the two are discerned, we can make suggestions that help to realign goals and objectives. One common obstacle for project management is that team members are rewarded for performance that is outside the scope of the project. In other words, individual behavior is rewarded, while teamwork and collaboration are desired.

This may be crystal clear from our perspective and masked at the senior levels. With diplomacy and tact, we can make suggestions for improvements in these areas. Even if our suggestions are not implemented, the process of learning the system in such detail will enable us to find ways to bridge the gaps.

Leading without Authority

Results without Authority[97] by Tom Kendrick is an excellent book on this topic. The author teaches us to gain authority using the tools we have available. Those tools are process, influence, and metrics. Through judicious use of each, we gain leadership authority. We have spoken on this topic many times, as it is one of the most requested within the realm of project management. It's awesome because the world of project management has always been reliant on leadership skills for success. Using power and authority as a project manager has unquestionably limited existential utility because it requires a direct hierarchical relationship between the project manager and the team members, and that does not exist in a matrix environment.

In this location of the matrix, we have the opportunity to put these skills to the ultimate test. Not only do we not have authority with the people we are attempting to lead, but they also have authority over us. It may be helpful to remember Eisenhower's words, "Leadership is getting [people] to want to do what needs to be done."[98]

The action here is to lead when leadership is needed, even if you don't have the authority to do so. The authority to lead will be granted to you by those whom you lead, or else you will not lead. It is often said that to determine if you are a leader, you merely need to look behind you and see if anyone is following.

When something obviously needs to be done, do it. Don't wait for permission. If it needs to be done, the doing of it will be appreciated, even if that appreciation is not obvious.

The Workplace Environment Mini-Quads

In this section, we will explore the attributes and actions available in the Workplace Environment mini-quadrant.

The Workplace Environment Micro-Quads

Exhibit 74: Dimension 3 Workplace Environment Micro-Quads

Safety

There has been a focus recently on psychological safety in the workplace, and this is an important concept. It means ensuring an inclusive environment, which is one in which everyone feels comfortable to share ideas as well as criticisms. Debate should be welcomed and not lead to arguments and confrontation. Healthy debate will lead to innovation and improvements.

The need for psychological safety cannot override the managerial responsibility for physical safety. This may be taken for granted at the frontline level because it is mainly taken care of by other departments, such as security, or by the facility and technology.

Our action item is to understand the level of physical and psychological safety that is required and to understand what is in place. From there we can determine if and what we may be able to help improve.

Creativity

Closely related to safety is creativity. How creative can we be if we do not feel safe? If we think that someone is going to make fun of us for sharing an idea, we may not share it. A creative environment will bloom and blossom on its own by creating the environment in which creativity can grow and flourish.

Motivational

Whenever we discuss motivation, we mention Daniel Pink's book *Drive*[99] in which he discusses the three necessary elements of motivation: autonomy, mastery, and purpose. At the strategic level, many of the obstacles to motivation can be easily removed.

Obsolete policies or procedures can be removed or refined. Autonomy for individuals can be established within a framework of enterprise-directed results. The idea is that at this level, motivation is all about creating the motivational environment rather than attempting to motivate people. People will do their best work when you simply allow them to do so.

Innovative

Disruptive innovation does not tend to result from continuous improvement. One of the best examples of this is the modern smartphone. It is not a result of continuous improvement of telephone technology. That improvement led from the black tabletop dial unit to the olive green princess version that was wall-mounted and had pushbuttons instead of a dial. Let's ring someone up! Ahoy![100]

Continuous improvement does, however, lead to a high-performing team. And high-performing teams create innovative products and ideas.

The Strategic Metrics Mini-Quads

In this section, we will explore the attributes and actions available in the Strategic Metrics mini-quadrant.

The Strategic Metrics Micro-Quads

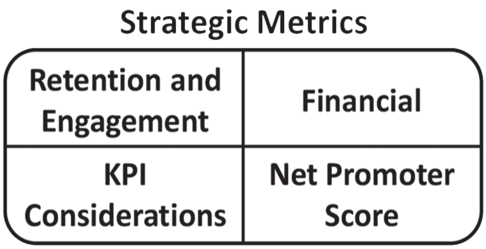

Exhibit 75: Dimension 3 Strategic Metrics Micro-Quads

KPI Considerations

Strategic engagement is all about managing up. Here in the Motivate Quadrant of Dimension 3, we are hoping to motivate an organizational or process change. In order to do that, we must gain the trust and confidence of senior management, and in order to do that, we need to be able to understand their perspective.

Throughout our careers, we've experienced, as we're sure many of you have experienced, managers who have expressed frustration at metrics being met while simultaneously being frustrated with overall results.

As trainers and consultants, we've talked directly with senior managers, CEOs, and company owners who have expressed the same frustration. They tell us that the reporting to them shows that operations are running as efficiently as possible, and each department manager reports successful results.

The issue in many cases is that the metrics, the KPIs, have become the goal instead of simply a source of information and guidance.

Understanding the senior management perspective means understanding that this system is currently working well enough. Change may not be desired at this level, especially by department managers for whom the metrics mean success, both personal and professional.

Ken Blanchard's wisdom applies: "Seek first to understand, then to be understood."[101] Be sure you understand the metrics being used and how project goals support organizational metrics and strategic objectives.

Net Promoter Score

Net Promoter Score (NPS) is an important metric that we should understand. It has become popular in recent years because it is a direct measure of your popularity in the business environment. It is highly sensitive to social media, especially in the negative sense. A negative social media comment can do a lot of damage to a business and can be problematic to reverse.

NPS is a simple single survey question: How likely are you to recommend a product, service, or organization to a friend or colleague? NPS scores range from –100 to +100. At the time of this writing, it is considered to be a valid method of determining customer loyalty. One of the criticisms of the method is that it may not be reliable in predicting corporate growth.[102]

It's important with this metric, as with all metrics, to ensure that they are current and reliable. Any particular KPI, such as NPS, may be replaced by a new way of measuring progress against desired results. In this case, the corporate goal is retention of customers.

What can we do from our perspective as middle managers and frontline leaders to support customer retention? Plenty! We are in direct contact either with our customers or with those who are in direct contact with the customer base. Senior management may or may not have that kind of contact.

Think about those with whom we interact when we engage with a business or professional enterprise—the front desk receptionist, the nurses in the hospital, the checkout folks, the servers, the workers. How often do we come in direct contact with senior management?

Clearly, we have a direct impact on NPS. Our action here is to have the most positive impact possible and shine the light on your team. The way to do that is to be sure that your metrics feed directly into the metrics at the senior level.

If, for example, NPS is the metric that you want to support, you can break it down from a goal into project-related objectives. What is the current customer retention rate, and what is the goal? Here are some possibilities for SMART objectives supporting the goal of increasing customer retention from 75 percent to 90 percent:

- Make your team your priority.
- Implement agile project methodology to ensure consistent engagement.
- Use lean techniques to reduce waste and improve quality.

Retention and Engagement

These elements are often cited in the same sentence because of the close relationship between them. Improving engagement is the leading way to increasing retention. This is true of employee as well as customer engagement and retention.

As strategic metrics, they are critical. One of the actions for frontline leaders here is to ensure that these are being measured. These particular metrics have been often historically associated with HR, but every member of the organization has potential impact on these.

Retention and engagement are two of those longer-term metrics that we can easily lose sight of when we're down in the trenches digging through the daily mire in which we often find ourselves. Driving toward short-term performance goals can sometimes cause us to take shortcuts that sacrifice these metrics.

The action is to ensure that our project plans and performance metrics are aligned with the strategic objectives related to retention and engagement.

Financial

A balanced scorecard[103] is a strategic tool that helps planners balance financial and non-financial metrics. On a typical scorecard, financial metrics will encompass only 25 percent of the strategic goals. The history of the balanced scorecard and the reason for the name is that prior to its implementation, management focused almost exclusively on financial metrics.

The importance of financial metrics, therefore, should not be minimized because they now comprise only 25 percent of the strategic goals. Without the correct balance in financial performance, there will be no organization. This is true of any enterprise, whether for profit or not, because all enterprises require funding to operate.

All management should be acutely aware of the financial performance of the organization, and the way in which they manage their teams impacts the financial performance.

The action for frontline leaders wandering around Dimension 3 is to take note of the financial metrics that are available. Determine if and how financial metrics are translated to operational performance. In other words, is the way in which people are rewarded supportive of strategic goals as well as operational metrics?

If the performance management structure supports strategic goals, then your job may be easier because you probably are not trying to induce change in the infrastructure. You may need to realign your team's operational metrics, but that is within your authority.

If, however, that is not the case and you recognize that institutional change is needed in order to support organizational goals, then you must determine the most effective path with the highest likelihood of success. Think about your options, remember your endgame, and determine what you may be willing to sacrifice to achieve your purpose. Remember that introducing change at the senior level is a negotiation. You must be ready for a give and take.

The Nurture Quadrant

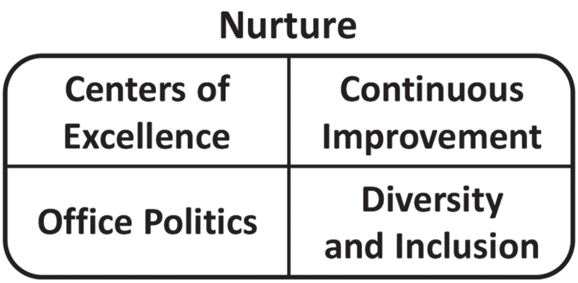

Exhibit 76: Dimension 3 Nurture Mini-Quads

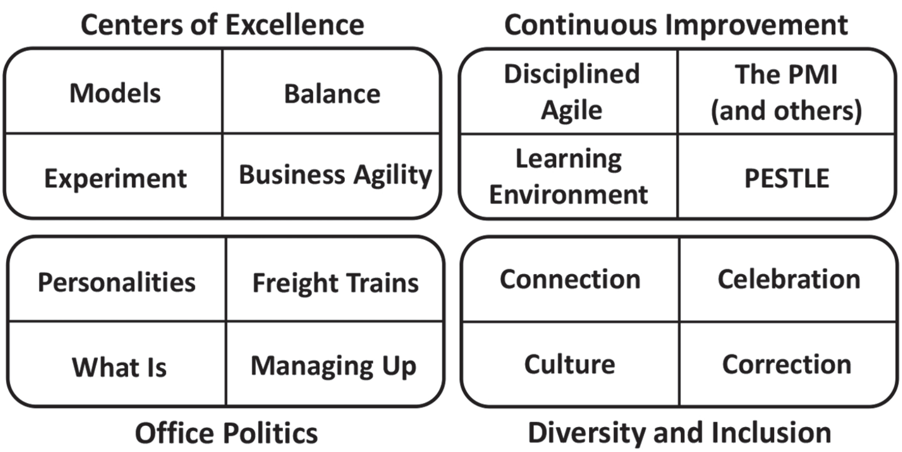

Exhibit 77: Dimension 3 Nurture Micro-Quads

The Office Politics Mini-Quads

In this section, we will explore the attributes and actions available in the Office Politics mini-quadrant.

The Office Politics Micro-Quads

Exhibit 78: Dimension 3 Office Politics Micro-Quads

What Is…

…And what should never be.

A great Led Zeppelin song[104] and what office politics is all about. We are often amazed at the exclamations we hear in our workshops "that shouldn't be happening." Unfortunately, they are responding to something that a fellow attendee brought up as an example. It is something that *is* happening! Now. To them. And they want an answer. In some cases, in many cases in fact, this singular issue is why they came to the workshop. So, the response of "that shouldn't be happening" is, well, unproductive. The first step is recognizing that what is…is. It is not going to change, or at least, the change that you would want is not in your control. You can't change it, so you must either live with it or leave.

Those who understand politics especially well also understand how to sense change and get in front of it. For example, in Dave's prior neighborhood in Maryland, there were going to be new sidewalks built. It was absolutely going to happen as a part of an overall expansion plan.

However, these things take time. The neighborhood politicians rallied and proclaimed that they would get the sidewalks built. They said it often and loudly. And indeed, the sidewalks got built, and the politicians got elected! You can do this at work. We've known people who seemed like magicians in their ability to predict what was going to happen. But it was easy for them because they had lived the experience before.

Dave knew an engineer who had so much experience that he could absolutely predict the issues that were about to plague the new project manager or lead engineer.

He would try to help. He would offer solutions to problems they didn't know were going to exist. But the problems were going to exist.

Managing Up

Managing Up is a great book written by Rosanne Badowski. Check it out some time, but in the meantime, we'll tell you that her general philosophy centers around giving management what they need. We agree with her general philosophy: the best way to manage up is to give your management what they need.

Personalities

Personalities in Dimension 3 is a matter of understanding that personalities are dynamic, and even our own personality will change depending on the situation. Are we the same person at home that we are at work? Do we react the same way in an emergency as we do in a routine situation? How would people describe you? Can you be depended upon to act a certain way? There's our action. Be sure that you can control your emotions and project a positive and agreeable personality. That will help you project yourself as open and inviting and…engaging.

Freight Trains

Dave often talks about one of the most valuable pieces of advice he was ever given: 'if a train is coming down the tracks, get off the tracks.' It sounds simple, and in physical reality, it is easy to understand the risks of not doing so. But in metaphorical land, it's not so simple, because a metaphorical train is not as easy to see. Sometimes they seem beatable. But they aren't.

What is a metaphorical freight train? It's a reality that's coming at you. It may be a political reality, one that shouldn't be taking place but is, or it could be a change such as an organizational change with which you don't agree. There is no point in fighting it, and in fact, the sooner you can get on board with it, the more likely it is that management will have a positive view of you. This is called strategic alignment.

The Diversity and Inclusion Mini-Quads

In this section, we will explore the attributes and actions available in the Diversity and Inclusion mini-quadrant.

The Diversity and Inclusion Micro-Quads

Diversity and Inclusion

Connection	Celebration
Culture	Correction

Exhibit 79: Dimension 3 Diversity and Inclusion Micro-Quads

Culture

Create a culture of diversity, one that sources an eclectic collection of ideas and notions. Along with this will come an eclectic collection of values and ideals. That's where inclusion comes in. Respect is afforded to values as well as to ideas. The best way to invoke this cultural paradigm is to demonstrate it through your actions.

Be certain that everyone has an equal opportunity to be heard. Practice active listening. One of the more common complaints from people who feel ignored is that people look away while they are talking. This can be especially true if there are biases (conscious or subconscious) at play. For example, we've been in business meetings where Lisa was clearly the prime speaker on our side, yet—quite often, in fact—if we were talking to a man, he would turn to Dave and begin speaking.

Correction

A correction needs to take place quickly in these instances because a meeting will go south if this person doesn't start speaking with Lisa. There are different ways to make the correction, spanning from leaving the room to simply saying something to the effect of, "Lisa is in charge of this."

We may have to make corrections like that within our teams. Remember that a diverse team is likely to consist of people with different backgrounds and values. This is an opportunity to see that gender, gender identity, skin color, race, ethnicity, or even strange New England accents are not going to hinder anyone's inclusion on this team.

Connection

We can often help people make connections. We may have a broader view of the team, know a few things about people, or even know a few people and be able to connect them through their similar interests.

Celebration

Celebrating diversity and inclusion in Dimension 3 is a matter of answering the question: how do we keep it going? This isn't just a matter of demographics, especially in a multifunctional organization. It's a matter of diverse ideas coming together.

At one point in his career, Dave was the lead mechanical designer for a project. This meant that a few folks from the mechanical design department were assigned to work on this project. Some were part time, some were full time, but even if a person was assigned to your project full-time, you had to consider what that meant in reality. It certainly did not mean that they were going to be on your project for forty hours each week. There were many difficult challenges in this project, and the end product was going to be produced in the thousands. It would be used by telecommunications line people in the field—quite a rugged environment. They were under schedule pressure, budget pressure, and design pressures.

Based on Dave's background, he wanted to invite people from all over the company to his early concept and design meetings—production people, quality assurance, buyers, marketing, sales, other departments—and his management stopped him. "We don't need those people," he was told. "It is too early in the process. They do not have the training and the background to provide valuable input at this stage." There may have been two things that his management in actuality didn't want: (1) resistance to ideas, and (2) the political fallout that can happen from being transparent in an environment that does not reward transparency.

In other words, this was a political environment. Not elected politics, but office politics ran deep. It was a hierarchical company where the higher you went, the more perks you received and the more money you made. It was extremely competitive, more so the higher you went. Sharing ideas was not encouraged.

In fact, in one performance evaluation, Dave was told that he was technically weak because he held brainstorming meetings seeking input from outside the department. Dave does not feel that was the case. In fact, in many cases, his team already had a solution, but he wanted to be sure that the extended team was brought in and tested the design assumptions and thoroughly exhausted all possibilities.

Oh well, we guess Dave was before his time. But that aside, they got a lot of great ideas from places that would come to surprise his manager, including manufacturing, quality assurance, procurement, contracts, HR, and others. Everyone who works in the company is a stakeholder in it. Everyone has a different perspective.

How many people work for a company and have no idea what it makes or what services or what value it provides? Very few. Hopefully, none. Therefore, every employee is not only a stakeholder but an informed stakeholder. At least, more informed than the average person on the street who knows nothing about you or your company. So, from where would you not want to get new ideas?

But the problem is that getting input is time consuming. If people are not involved in the process of creation but are impacted by the outcome of that creation, then they are almost certainly going to have an opinion about it once it exists.

In the absence of an effective communications process, this input tends to come at the most inopportune moments. It is interruptive. And what if it's a good idea? What if it's something that is going to impact the schedule? Would it not have been better to get that information earlier?

The Centers of Excellence Mini-Quads

A center of excellence (CoE) starts with a team that provides leadership, best practices, research, support, and training for a focus area.[105]

The Centers of Excellence Micro-Quads

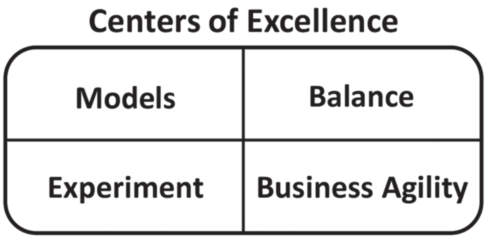

Exhibit 80: Dimension 3 Centers of Excellence Micro-Quads

Experiment

Experimentation is good for an organization in many ways. It is a source of innovation and motivation at the same time. Allowing people the independence to experiment and try new ideas is a great way to keep people engaged in the work and interested in the company. A CoE can be used to try new processes or procedures and develop pilot programs. A CoE can be used also to experiment with different people in different leadership roles. Hidden leaders[106] can be difficult to expose through the normal processes of promotion. Leadership talents may be masked by the day-to-day demands of the job, and allowing people to volunteer for leadership positions within CoE-type groups can provide opportunities for people to shine!

Business Agility

Business agility[107] is the ability of a business to effectively pivot its operations quickly to meet changing marketplace demands. The ability to experiment enables business agility by allowing the legacy side of the house to go on with its revenue-generating activities and not interrupt production flow. We like to compare business agility with human flexibility. In order for a body to be flexible, each part needs its own flexibility, while not losing its connection to the body. That is true also of organizations. Each part of the organization needs to have the autonomy to operate independently without losing its connection to the whole.

Models

There are several models for a CoE. Our job as a frontline leader working in Dimension 3 is to recognize the model that is being used and be able to judge its effectiveness for ourselves. It may be an integral part of an operation and a formal shared services team, or it could be at the other end of the formality continuum and be a collection of coaches ready to provide assistance in specific areas, such as agile or a particular technical area.

Understanding the model that is being used will help you integrate with it or possibly start a new CoE, such as an interdepartmental CoE that exists to tear down the silo walls.

Balance

Joining a CoE may help you balance your career and facilitate career growth. If you are not blessed with a technical background, you may be able to broaden your perspective, and likewise if you have a more business-oriented background, you may benefit from joining a technical CoE.

The Continuous Improvement Mini-Quads

In this section, we will explore the attributes and actions available in the Continuous Improvement mini-quadrant.

The Continuous Improvement Micro-Quads

Continuous Improvement

Disciplined Agile	The PMI (and others)
Learning Environment	PESTLE

Exhibit 81: Dimension 3 Continuous Improvement Micro-Quads

Learning Environment

A learning environment is one in which experimentation is valued. Failed experiments are not mistakes, although mistakes are tolerated. We learn more from mistakes than we do from success. Studying for exams is far more effective when we look up answers that we get wrong while taking practice exams. We don't do that for answers that we get right. We may have guessed, or we may have answered correctly but for the wrong reason. In any case, we learn nothing by answering a question correctly. But we learn when we make mistakes and then look for the reasons for the mistake, whether that be looking up an answer or finding a new process or way of doing things. A learning environment is one that encourages measured risk-taking, rewards innovation, and works with positive reinforcement.

PESTLE

PESTLE[108] is the tool, the action, the acronym for Political, Economic, Social, Technological, Legal, Environmental, which helps us shape our vision and understand the factors that will influence our decisions. Using this tool as a checklist, we can determine the factors that our teams and projects are affected by and sensitive to and then prioritize our actions based on the impacts.

Disciplined Agile

Disciplined Agile (DA) is a process-decision toolkit. Complete with its own certification path, it's an excellent toolkit for continuous learning and improvement. Described in the book *Choose Your WoW!* by Mark Lines and Scott Ambler,[109] DA gives us a path forward for continuous improvement in any project environment. Whether you are currently in a traditional environment, or Scrum, or Kanban, or SAFe®,[110] there are tools and methods that can help you and your teams advance.

The real beauty of it is that it is evolutionary and scalable from small to large projects. It is a people-first approach, which is absolutely the strongest reason that Lisa and Dave support it.

We've often said that if management were all about intimidation and bullying—if that were what worked best and was being taught as best practice—then we wouldn't teach management. But those things don't work best! And DA is one more set of tools that can help you, the frontline practitioner, by providing you with a finer set of tools. The precisely correct tool for the very specific job that you have to do.

The PMI and Others

You should choose carefully when you determine how to spend your time and money. We are long time advocates and members of the PMI for several reasons, the most fundamental being that as a resource, they are valid. The material is backed by studies, surveys, and research. While there is plenty of history, the PMI offers the most complete collection of current project management material available anywhere.

Wrap Up
The Engagement Matrix

PROJECT MANAGERS AND TEAM leaders often find themselves in a position of responsibility for the results of a team but lacking the authority to manage performance. Formal performance management is governed by the organization through human resources and functional managers.

Frontline leaders are faced with a multitude of challenges on a daily basis. These challenges often involve people, which adds an element of unpredictability. Emotions can run high when teams are under pressure to deliver results. The chaos of the moment can cloud the issues rendering decision-making difficult or even impossible. Clear and concise direction is needed.

The perspective of the leader is an important facet to understand in order to move forward effectively. *The Engagement Matrix* considers three perspectives that are typical for frontline leaders. We call them dimensions.

Dimension 1 is the perspective of a frontline leader and their team. Dimension 1 is also an effective introspection tool. In Dimension 1, *The Engagement Matrix* is a tool that enables supervisors, project managers, and frontline leaders to assess and respond to dynamic and challenging situations quickly and effectively. The basis of the assessment requires answers to two questions: What level of proficiency are we dealing with? What is the level of interest? By answering these questions, we identify the location of the individual or group within a quadrant. The quadrant location gives us a starting point for leadership action. Those starting points are then further defined by directional mini-quads, which then divide into micro-quads yielding sixty-four potential leadership actions.

Dimension 2 is the colleague perspective. In Dimension 2, we are working with our associates in middle management to improve collaboration and interdepartmental communication. In this dimension when we consider proficiency and interest, our perspective is oriented toward the organization itself. How good is the organization at enterprise-wide collaboration? How much interest is there in improving the working environment? Many times, the roadblocks we encounter in these areas are related more to office politics and cultural conflicts than to any physical or technical barrier to progress. *The Engagement Matrix* provides options to consider when facing these types of circumstances.

Dimension 3 is all about managing up. It gives us the perspective of project managers and team leaders working with senior management toward common goals and strategic objectives. It is often frustrating for frontline leaders when it seems that senior management doesn't understand the day-to-day needs. Decisions are made and handed down that cause conflict and consternation. Senior management seems to work in isolation and ignore the problems in the trenches. Dimension 3 provides sixty-four suggestions for managing up. Diplomacy and tact are certainly required as well as patience and an understanding that the perspectives are different. Dimension 3 is the perspective of the frontline leader managing up. The senior manager in that situation is in Dimension 1. You are part of their team.

To be an effective leader, we need three elements: (1) skills, (2) training, and (3) tools. Skills are developed over time through training and practice. Tools enable application of those skills. *The Engagement Matrix* is a tool that will help you manage difficult situations on a daily basis, thereby helping you to become a more effective leader, creating and maintaining continuously improving, high-performance teams!

Meet Dave

Dave has had several positions ranging from drafter and engineer to manager and project manager. Dave is a generalizing specialist who learned engineering at night while working in the daytime as a mechanical drafter. This arrangement has mutual benefits for the individual and the organization with opportunities to apply academic principles at work. Seeing things in action and participating in the product development process enables deep learning through hands-on practice, and the team may benefit from a new idea or a different approach to a problem.

Becoming a generalizing specialist happens over time. Dave graduated from Dover Regional Vocational High School where he studied mechanical drafting. He then served three years in the U.S. Army as an electronics warfare specialist.

Following the Army and still not sure of a career direction, Dave's college education began slowly with two evening courses per semester. Simultaneously working as a drafter during the day, Dave recognized that his career as a mechanical drafter may be jeopardized or at least limited by the advent of computer-aided drafting machines. It became important to not only draw the drawings but also understand what was in them. Why was a certain material selected? Why was a specific tolerance used? Within only a few years, the job of mechanical drafter would be nearly eliminated because drawings would be created on a computer by the engineer or architect during the design process, rather than drafting being a post-design documentation effort with its own progressive career path. While this would eventually allow the mechanical design process to be streamlined, it would substantially reduce the number of drafting positions available.

The career path for a drafter changed. Instead of progressing within the drafting department through the levels from junior to senior, a drafter could follow a career path to become an engineer, usually requiring a formal education and credentials.

It would be a long road to an engineering degree for Dave. Having completed enough engineering courses for a degree, Dave had not taken any non-technical courses when he and his lovely wife and two young children moved from outside of the Boston area to western Maryland, where Dave had accepted a position as a mechanical engineer.

At this time, while he had studied engineering well beyond the associate level, his degree only reflected a two-year course of study. While deciding where to finish his four-year degree, he experienced his first project manager at work. His previous work experience had been exclusively in the mechanical engineering departments. But now, as a member of a multifunctional team working side by side with electronics engineers and software developers, he experienced formal project management for the first time. And he was impressed! The project managers seemed to have a handle on all aspects of the project and were able to address issues that were outside of their core subject matter expertise. This was the perfect position for a generalizing specialist.

Dave went on to earn a degree in telecommunications technology and a master's degree in technical management. While studying leadership at night, Dave was asked to take a lead role for the mechanical team on a project. He accepted the role and was excited to learn that he would be invited to attend corporate leadership training. It was there that he discovered that if we create a pleasant working environment, our teams will be more effective and productive![111]

Over the years, Dave has experienced failures at organizations from the inside out. He's seen departments and teams fail, individuals fail, companies fail, often resulting in lost opportunity due to a lack of vision or adequate leadership. He was usually down in the trenches working while upstairs it seemed that catastrophic errors were being made. Any cynicism you sense in Dave's material comes from the fact that down in the trenches, people lost bonuses and raises and eventually their jobs while the folks upstairs made a lot of money, in some cases executives taking bonuses in the same year that people were laid off. He's also experienced a great deal of success with project teams, and he is excited to share those lessons to help you minimize failure and optimize your chances for success in the ever-changing world of project management and leadership.

Meet Lisa

Lisa followed a mostly typical path throughout her education. She was born in Brooklyn, New York, and was an exceptionally good student. Thus, she was quite shocked when one day in December in second grade, she was told that she needed to go to the principal's office. In fact, not shocked, but in tears (she remembers it quite vividly). When she got to the principal's office, her parents were in there, which shocked her even more. Once they calmed her down, she was told that because she was doing so well, they were moving her into third grade. Well, yes, that is the natural progression. No, she was moving *the next day*. They were in essence skipping her a grade, but rather than just jumping over a grade, she completed half a year of second grade and was going to finish out the year in third grade. It was at that time that she decided she wanted to be a schoolteacher and always thought fondly (to this day!) of her second-grade teacher. Did Lisa attribute the ability to skip a grade to this teacher, or was it because of some other factors, she's not sure. But she knew then that she was going to become a schoolteacher.

When Lisa's family moved to Long Island a few years later, although the transition to a new school was a bit difficult, she didn't veer from her desire to be a teacher. So, Lisa's career path was determined, or so she thought. She attended the University of Maryland and, of course, majored in Elementary Education. As a student teacher in Baltimore City, for the first time in her life, Lisa truly learned about cultural differences, poverty, and racism. She had the most enlightening experience and decided at that time that she wanted to work with students in need. During college, Lisa spent her free days as a substitute teacher and truly loved every minute of it. Upon graduation, Lisa was one of only a few from her graduating class in the College of Education who was immediately offered a position as a sixth-grade classroom teacher in Prince Georges County, Maryland. Believe it or not, teaching jobs were very hard to come by at that time, so many of her cohorts found other work. In addition to her teaching job, she also was elected to be the teacher's representative with the union, so she had an active role in the politics of the position as well, which served her well as she moved into the corporate world.

Unfortunately, Lisa really had not thought too much about the financial side of things, and during her first year of teaching, she found that teaching was not paying the bills. She took on a second job working part time as a supermarket cashier at night and on weekends. While she enjoyed that work, it didn't leave a lot of time for grading papers or lesson plans. After three years of teaching, the supermarket offered Lisa a full-time job as a bookkeeper with a substantial increase in salary. Despite how much she was "living her dream" of teaching, she realized that it was not practical at the time and accepted the bookkeeper job. She was put in a position of managing a team in the supermarket office and realized that she really enjoyed the management side of things.

After a few years, while looking for other opportunities, she saw a job post seeking someone with experience in childcare and food service to travel to various cities in the United States under a contract with the USDA, checking on the federally subsidized meals being served in family daycare homes and daycare centers. Combining two areas of interest for Lisa—childcare and food service—she applied for the position and was one of several people selected for the job.

Lisa was sent to rural areas of Louisiana, Mississippi, and Texas, meeting with inspiring people who opened their homes to care for local children while their parents were at work. These daycare providers were proud of what they were doing and were often excited to share their home setup, the food they served, and how they cared for the children. Speaking of the food, they all wanted to share their meals with Lisa and would have been insulted if she had turned them down, and so it was then that she discovered such culinary delights as cheese grits, spaghetti pie, and sweet tea. The pattern continued whereby Lisa had the opportunity to see the diversity in our country and learn about how others live and thrive! Money was not a factor for many, and they seemed so much happier than those who were quite affluent.

How did Lisa get into project management? Well, once that USDA assignment ended, the government consulting organization that had hired her was tasked with conducting telephone surveys with the parents of those attending the daycare centers and homes that Lisa and her colleagues visited during the earlier phase of the contract. Lisa was asked if she wanted to remain with the company and help out, and she gladly accepted and learned quite a bit about computers and survey research.

After a few months, Lisa was asked if she wanted to fill in for an executive assistant (EA) who was going to be out for a few months, and while she didn't know anything about being an EA, she was eager to become more ingrained in the company. She accepted the position and learned quite a bit during that time, not only about being an EA but also about business, leadership, and proposal writing. When it was discovered that she was proficient in writing, she was asked to help write proposals, and there was one in particular that was a long shot for the organization to win, but the company asked her if she wanted to spearhead it. She did, and they were awarded the contract—a large multi-year contract with the US Department of Education. Well, that solidified her position with the organization, and she was then put into the role of managing that project and, over time, managed many other projects and teams. When people tell Lisa and Dave that they don't want to join a company in a role that may not be just what they're looking for, Lisa regales them with the story of how she went from a cashier job and then consultant observing the meals served in homes in rural Louisiana to a director of a large organization with over fifty direct reports. Lisa continues to explain to others how sometimes we take an unexpected path to get to just where we want to wind up.

A Company Is Formed

Two of the most common questions we are asked are: how did you two meet?; and what inspired you to form Leadership Techniques, LLC? Here is the story. Dave was supervising a development team at a software development company that specialized in database and web development. Lisa was managing an interactive marketing company. The company Dave worked for was a subcontractor to the company where Lisa worked. One of Dave's team members was working as part of Lisa's development team, onsite at Lisa's location.

During the course of the assignment, they had an interesting employee challenge. Until that challenge occurred, Lisa had only worked directly with Dave's boss, and Dave and Lisa had not met. But that was about to change. One day Lisa came to work to find Dave's team member sound asleep at his desk. Snoring loudly in the open development team area. She wanted to spare the employee the embarrassment of being reported to the president of the company (Dave's boss), so she called Dave.

After they met to discuss how to deal with the situation, they discussed challenges we all face with staff where there just aren't answers in the usual playbooks. So, Lisa planned a roundtable meeting and invited about a dozen project managers and leaders from nearby organizations. The agenda was to discuss how we deal with various situations and hopefully learn from one another.

During the meeting, it was clear that most of the attendees felt that there were no processes available—no tools or techniques—for handling difficult managerial situations, and they had no idea how to improve on things. Dave and Lisa had ideas and actionable suggestions for the group. At the end of the session, two people independently approached Dave and Lisa and asked them why they don't take the passion they have for helping others and teach this information. Lisa, having her degree in teaching, and Dave, who always enjoyed teaching his teams, looked at one another and said, "Why don't we teach it"? So, with the approval of their current employers, they formed Leadership Techniques, LLC and planned to teach a class every other month or so.

As their business grew, they found that working at full-time jobs and having this side hustle was more than they could realistically handle, so they took the leap and put their full-time efforts into their company. While it was a risky venture with no guaranteed salary, they were confident that their passion would come through and they would make it. When Lisa left teaching the sixth grade to pursue her executive career, she always knew she would get back to teaching—she just didn't know in what form!

We don't know how you define success. At the time of this writing, we're still at it, working with clients and teaching classes. We love what we do, and we hope that our messages and stories, reflections of failures and successes, and the research and guidance we've provided help you to be happy at work and live a fulfilling life.

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