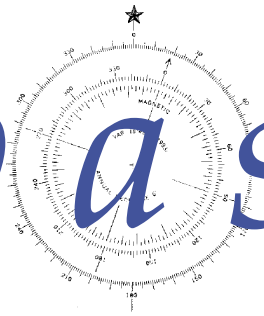
Special Edition of the Initial Issue!

True North project guidance strategies *www.projectcommunity.com*

Compass



VOLUME 1, NUMBER 1, January 1997

The Costs of Planning Alone

"I don't have the luxury of having time to get the project team together to create the plan." Common Complaint #4

How planning occurs can determine how manageable your project is. Whatever the justification, choosing to plan alone puts your project into the class of projects known as "centrally planned."

I have been researching what happens under central planning because many projects are centrally planned. The Soviet Union's sixty years of experience in central planning gives a hint of some common effects. The following strategies observed among Soviet managers are equally familiar to many project managers in the west.

These responses are features of central planning. All plans are inadequate because an unreasonable level of prior knowledge must exist in order for them to be adequate. This is even more the case when the plan is produced by those not responsible for executing the plan.

The following effects are most common where a flawed plan defines "correct" action. That is to say, where goodness is defined only as "executing according to plan."

1. Give False Reports

These take a variety of guises ranging from silence through veiled half-truths. Out and out lies are less common but not unknown. What the Soviets call "Familyness," where managers of competing projects quietly collude to "not disturb each other," keeps secrets secret. Schedule Chicken, where one project hides behind another's slip, is common.

2. Bargain for Easier Plans

Bargain for a lower output target than you can achieve, a later date than you can meet, or more supplied resources than you need.

3. Deliver Poorer Quality

Producing less than planned for quality pushes the project's failure out into the project's community, where cause becomes difficult to ascribe.

4. Cut Features

It's easier to produce one homogeneous good than many, varied ones. Port to fewer platforms. Trim nice-to-haves.

5. Build the Easiest Feature Mix

Choose based upon ease to produce, rather than on customer's desire.

6. Acquire Extra Supplies

Find extra supplies outside of planned resources. Borrow. Trade. Call in your owe-mes.

7. Maintain Hidden Reserves

Pad resource estimates.

8. Use Extra Labor

Overspending on labor (or any budget item) is often forgiven if milestones are met.

9. Use High-Priced Raw Materials

Go ahead, projects are often incented to use high-priced contracted resources rather than expand head-count.

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10. Encourage "Storming"

Storming, where 50% of a month's production is completed in the last five days of the month, is common near-milestone behavior on projects.

11. Resist Innovation

Improvements to process can complicate short-term success.

Planning Alone-Continued

"The managers do somehow carry through the job by various semi-legal means, disregarding impossible tasks, and performing others through an informal exchange among enterprises - an exchange not included in the planned allocation of supplies [or the reported use of resources]. Still, some managerial infractions... are certainly self-serving and antisocial in effect. On the whole, however, managers have made the system "work," and work better under imperfect planning than if managers mechanically carried out their plans."[1]

Do teams produce better plans? Perhaps, But a better plan is not the sole justification for planning as a team. The understanding developed when producing the plan allows the project to right itself when trouble comes. And trouble always comes.

My best solution for avoiding these compensating behaviors is a simple one. Plan it together!

Shared planning creates manageable projects. das

[1] *from The Soviet Economy by Howard J. Sherman ©1969 by Little, Brown, Inc. Boston*

Milestones or Millstones?

Milestones are clear, unambiguous points used to help gauge progress through a project schedule. They are meant to serve as objective indicators of progress against the planned objectives. In this way they are guide posts.

Milestones also serve as goal posts. As goal posts they are supposed to be motivating targets. But not everyone is equally motivated by milestones. Some behave as though they were carrying a millstone when assigned to work toward a milestone. Why?

Work for some people is a straight forward matter of listing what tasks need to be done, doing the work, and then checking each completion off the list. These people are motivated by completing tasks. They view time as precise: an hour is always an hour. They like and use time management techniques. Their work spaces tend to be tidy. Milestones motivate these people.

Work does not seem so straightforward for others. These people use lists as menus of possibilities, often losing them before completing all the listed tasks. They are motivated by starting new things. They view time as imprecise and often struggle when estimating. They prefer instead to "keep their options open" and "see what happens." They might find themselves being enrolled in a time management class, the effect of which wears off within a day or two. Their workspaces tend toward clutter. These people are burdened by milestones.

If you are the sort of person who is motivated by starting new things, your current work commitments might feel in the way of getting real work done. You might find yourself losing your milestone amid all the competing attractions. You might feel misunderstood, mistrusted, and, in extreme cases, punished for what to you seems like the only really reasonable way to accomplish work.

If you are the sort of person who is motivated by milestones, you might be baffled at how these others ever get anything done. You might be frustrated by their eleventh hour heroics that seem unnecessary and counterproductive to you. If you are managing these people, you might feel as though you're herding cats, each chasing every alluring distraction along the way. You might consider these project team members resistant, uncomplying, or just plain difficult.

Advice?

1. <u>Stop trying to reform them!</u> Their strategy for getting work done may be sloppier than

yours, but it's no less valid or effective. Your reform efforts will have little effect upon either these people or your project.

2. Focus their attention upon what they'll get to do next, after they finish this task, rather on what they must do now. This is a simple shift in perception. Because these people are motivated by starting new tasks, help them focus upon the task they'll get to start after completing the current one.

Every project benefits from a diversity of work styles. Insisting on uniformity can rob the project of its true potential. Valuing these different approaches can be difficult without an understanding of what motivates which group. This understanding can help evaporate the millstones and further illuminate the motivating aspects of your project's milestones. das

Mastering Projects Workshop

An alternate vision to project management

Whether you manage projects or support those who do, you need to know about Mastering Projects Workshop (MPW), a three-day seminar providing the essential skills that spell project success.

Who can master projects? Everyone from first-time project managers to veterans - even those who must manage projects without having the title of project manager can master their projects.

MPW teaches what the world's most successful project managers understand - how you can unlock the potential within your project by helping each participant find their project within your project!

"I came expecting training and I left with an education."

Leading through power is a self-defeating act - The days of generating results by wielding authority are over. Today, the game is won by those who can elicit cooperation and build the relationships that bind together a project community.

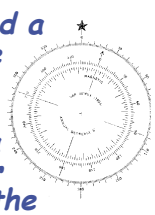
What tells you your project is successful? On time? Within budget? Meets specification? Mastering Projects shows how the quality of each participant's experience translates directly into project success; how your project can be successful without sacrificing any one's humanity. Would your present project team choose to work together again? If not, look out!

There are tricks of the trade, but these tricks are not the trade. The most successful projects aren't those with the best PERT or Gantt chart. The most successful projects result from the simple power of a shared vision:

- of the objective,
- of the process,
- of the reasons why this project is important.

This shared vision creates a more self-managing project community - one more naturally committed to pursuing common targets.

I've never attended a workshop where we really talked about the issues that dictate success on a project. I'll never be able to look at the jerks on my project in the same way again!



Success doesn't lie in becoming a slave to your project. A more self-managing project means the project's manager has less to do. Mastering Projects Workshop shows you how to succeed by concentrating on less - not more!

MPW teaches skills that make a team work well on this project, then want to work together again by:

- Planning projects within uncertain futures
- Grounding bright ideas to create a common objective
- Creating understandable and maintainable project schedules
- Gaining support without overwhelming yourself
- Creating reasonable boundaries around your project
- Creating projects that align with your organization's values

This isn't just the best Project Management seminar I've attended, it's the best seminar I've attended!

MPW will give you the ability to teach yourself how to become the project manager you'd like to become by providing tools and techniques and a framework within which to use them. You will leave the workshop with a more manageable current project and a fresh perspective to apply to every future one.

***Warning**: Attending MPW will significantly increase both the success and the quality of the experience of participants and their project community members. This effect may impact the entire organization.*

Notices:

The next meeting of MPW past participants will be Monday, January 27, at 11:30 a.m. at the Oregon College of Arts and Crafts Cafeteria. All interested parties are welcome. Call (503) 653-9773 if you need directions.

Presentations by David A. Schmaltz:

PROBLEM SOLVING LEADERSHIP WORKSHOP March 3-8 1997, Albuquerque, NM. Contact Susie Brame at **suzeque@aol.com** for details.

Paper entitled "ADAPTING TO LOCAL CUSTOMS: A Process For Adaptive Project Management" April, 1997, Frontiers in Project Management Conference, Boston, MA. Contact True North at (503) 653-9773 for details.

About *Compass*

Compass is published semi-monthly by True North pgs, Inc., and is distributed free of charge to a project-oriented community.

I've created *Compass* as a navigation aid for continuing your process of becoming a project manager. *Compass* will share stories and insights to serve as the basis for you to provide more effective project leadership to you and your team.

It is through sharing our stories and our insights that we enable each other to improve the quality of our project experiences.

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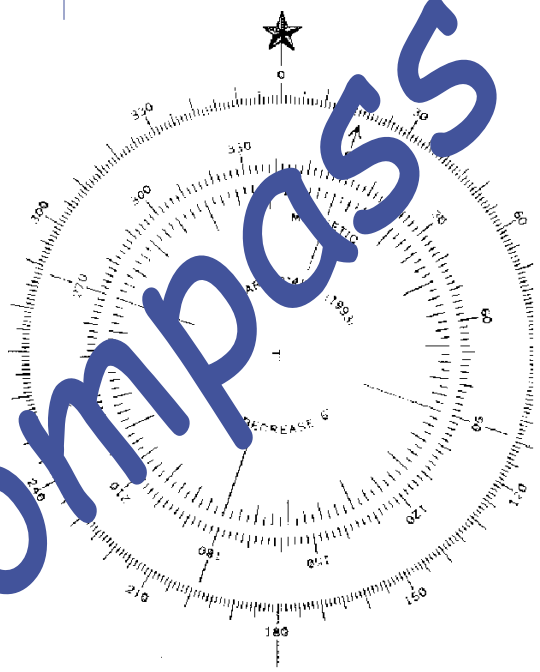

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What Can You Change?

Recent book browsings have uncovered a couple of interesting works by Dr. Martin E.P. Seligman of the University of Pennsylvania in Philadelphia. *What You Can Change and What You Can't, the complete guide to successful self-improvement* (Alfred A. Knopf, New York 1994) is an attempt to codify the findings of the most current research into such phenomenon as anxiety, depression, anger, eating, drinking, "merry making", and the much discussed topic of "growing up-at last."

His work is centered around reporting the findings of current scientific research. What is provably changeable?

Some facts about what you can change include:

- Panic can be easily unlearned, but cannot be cured by medication;
- Our moods are readily controlled;
- Depression can be cured by straightforward changes in conscious thinking or helped by medication, but it cannot be cured by insight into childhood.

Some facts about what you can't change include:

- Dieting, in the long run, never works;
- Reliving childhood trauma does not undo adult personality problems.

Seligman presents a simple three element model that outlines the common characteristics of those behaviors that are likely to change and those that are not.

1. To what degree is the behavior the result of biology? Inherited behaviors are less changeable that learned ones.
2. How easy is it to confirm the behavior? Behaviors that are easy to confirm (hard to disconfirm) are less changeable than behaviors that are hard to confirm (easy to disconfirm).
3. How deep is the belief in the underlying power of the behavior? Where an individual believes their behavior to be powerful, explaining many "facts" about themselves, the behavior is less changeable than where an individual believes their behavior to be specific to isolated circumstances.

Why do I mention this work in a project management newsletter? I see much project management time expended in misguided attempts to change the unchangeable. This book reminded me that what I believe can be changed is not the same as what science has proven to be changeable.

My belief in my ability to change someone else is not nearly as powerful as their belief in their ability to change themselves. das

"You may polish up common sense, you may contradict it in detail, you may surprise it. But ultimately your whole task is to satisfy it."

Alfred North Whitehead

Learned Optimism

The second Seligman nugget this month is called *Learned Optimism - how to change your mind and your life* (1990 by Pocket Books, New York).

This book chronicles Seligman's career as a scientist and a teacher. In the late sixties, he coined the term "Learned Hopelessness" to explain certain observed behaviors in both animal and human subjects. If hopelessness can be learned, he asked, can it be unlearned? The search for what he called Learned Optimism became his life's work.

Seligman cites studies showing that a person born in the second third of this century is twenty to thirty times more likely to experience depression in their lifetime than someone born in the first third of the century. Why? Seligman blames "explanatory style."

Everyone, he explains, has an explanatory style. It is what we use to explain our experiences to ourselves. If we explain the bad experiences as being permanent, pervasive, and personal, we have a pessimistic explanatory style. If we, as many who survived the economic depression in the thirties without experiencing any emotional depression, explain such events to ourselves as being temporary, superficial, and not our fault, we have an optimistic explanatory style.

Seligman concludes that we can learn to be more optimistic by consciously changing our explanatory style. Why is this important? I look at this as like being able to install better shock absorbers on your car. It makes for a less exhausting ride.

Will reading this book turn you into a raving gladhander? No! There are, Seligman notes, times when optimism is unreasonable behavior. When air traffic control asks your pilot if their plane should be de-iced before takeoff, an ounce of pessimism is a

healthy part of the response.

For those who naturally explain their normal, difficult experiences as permanent, pervasive, and personal, depression, Seligman argues, is a reasonable response. Finding the power to change this response can be transforming.

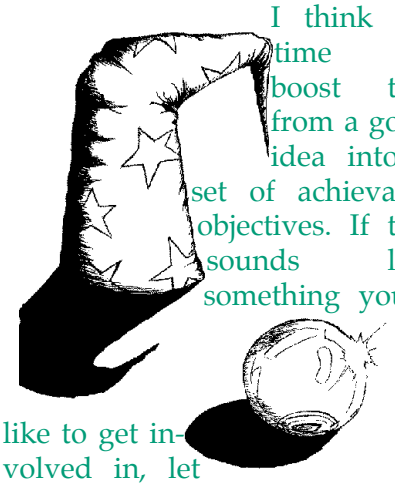
Seligman has conducted several studies into the possibility of being able to reliably interpret another's explanatory style. His technique, called CAVE for Content Analysis of Verbatim Explanations, is interesting and may have application in such project management activities as status reporting and requirements analysis. I have recently received a packet of detailed information on this technique from Dr. Seligman and may report further in a future Compass. das

Project Manager Dialogue

Those of you who have attended the Mastering Projects Workshop know that I believe project management is something that one must teach themselves. Dialogue is one of the most powerful tools in this self-education process. The problem has been explained to me over and over again by some of the most successful project managers: "I can't even find time to talk with my counterparts across the floor, let alone connect with a counterpart in another company."

I have been discussing with colleagues and clients the idea of a periodic sponsored dialogue between active project managers and everyone agrees that they'd love to participate. The idea is that working project managers would get together for a couple of hours every few weeks to dialogue on a subject of common interest, such as managing fuzzy projects or getting resources allocated.

The challenges are several but none of them are insurmountable. Let's start by simply gathering some general requirements. With no more explanation than that, what would you like to see? Where would you like to have these sessions? What time of day? How much would you be willing to pay to support this process?



I think it's time to boost this from a good idea into a set of achievable objectives. If this sounds like something you'd like to get involved in, let me know. I'll report on progress in the next issue of Compass.

What Is True North pgs, Inc.?

True North pgs (project guidance strategies), Inc. is a Portland, Oregon-based project management training and consulting firm dedicated to developing and sharing ideas that support the following tenets:

1. You are the most powerful project management tool you will ever use.
2. The key to managing projects effectively is to create self-managing projects.
3. The key to creating self-managing projects is to encourage open system behavior within the project community.
4. Project work is more effective when it's fun.

True North pgs designed the Mastering Projects Workshop and the Sun Microsystems' Managing Projects@Sun course to teach these basic skills to people who are assigned to manage projects as a part of the rest of their work, even though they do not share the title, authority, or career goals of a project manager.

"Uncertainty has become so great as to render futile, if not counterproductive, the kind of planning most companies still practice."

Peter Drucker

Appreciations

Kathy Carey for help with the layout of this initial issue.

Wilder Schmaltz for the hat and milestone graphics.

Ontara Passing

Some of you readers may recognize my name from my three-year association with the Silicon Valley-based Ontara Corporation. Ontara enjoyed nearly ten years of success working with the most innovative high-tech companies before the last of its partners resigned in early 1996 to pursue other objectives.

True North pgs, Inc. is the only firm to have retained the rights to use the information contained in Ontara's Project Mastery semi-

nar. So while Project Mastery seminars are no longer available, True North's Mastering Projects Workshop contains many of Project Mastery's basic ideas updated for the present time. No other project management seminar or workshop has worked so well for so many over the years. MPW starts where Project Mastery ended.

das

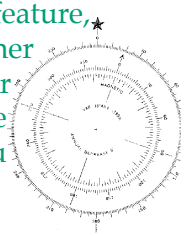
David's Note:

Hi, for those of you who don't yet know me, I'm David A. Schmaltz, President of True North pgs, Inc.

This newsletter is my attempt to pay back the community that has enabled me to do what I love to do. The topics covered in this pilot edition of Compass are the topics I am presently discussing when I have dinner with colleagues. I refer to this dialogue process as *echo-locating*, where ideas are "bounced off each other's forehead," becoming richer and more useful in the process. Welcome to the table!

Also, please tell me who else should be getting this newsletter and I'll add them to the list!

Next issue will feature, among many other things, the rules for playing Schedule Chicken. See you then! das



The Milestone Before Yearend

with homage to Clement C. Moore

'Twas the milestone before yearend, when all through the team

Not a contributor made headway, we were all losing steam.

The task plan was hung in the war room with flair,

'though it looked like an ink blot to most passing there.

Executives were nestled all snug in their heads

While delusions of market share feathered their beds.

My customer's expectations and I in my chair

Had just finished yanking another handful of hair.

When out on the project I sensed such a clatter

I sprang to my PERT chart to see what was the matter!

Away to my laptop I flew like a flash,

Clicked open the window and resized the cache.

The options it gave me as I pulled menus down

Gave me the sensation I could turn this around.

When what to my wondering eyes should appear,

But a miniature sleigh and eight tiny reindeer.

With a little old driver, so lively and quick,

I knew it the moment that icon was clicked.

More rapid than change orders his reindeer they came,

And he whistled and shouted and called them by name:

Now, Vision! Now, Boundary! Now, Dashboard and "Risken!"

On, Community, Commitment! On Model and Blitzen!

To the top of the project! To the top of the plans!

Dash on to the point where the problems began!

As objectives that before bright ideas fly

When they meet with an obstacle, mount to the sky,

So up from the laptop the reindeer they flew,

With a sleigh full of tricks and St. Nicholas, too.

And then, in a twinkling, I heard on the floor

The gnashing and wrenching of each little chore.

As I drew back my head, and was turning around,

Down my lap-mounted laptop came without sound.

My schedule was mangled, unrecoverable there,

So I left my poor laptop to smoke on the chair.

Then, adding this latest to the load on my back,

I turned to see what Santa had brought in his sack.

"My reindeers," smiled Santa, "have something to say."

And I listened with amazement that lasts to this day.

Vision reminded, "Without me you're lost,"

and Boundary recalled what infinity cost.

Dashboard directed, "You can't manage it all."

And Risken reiterated what softens the fall.

"Your Project Community enables this deal

And their willing support comes from what they can feel."

Model reminded, "The plan's not the fuel;

The planning's the work that will power this, fool."

And Blitzen said, "Urgency's no good excuse

For suffering to satisfy milestones obtuse."

Then Santa chimed in with a voice like a steeple,

"Your project succeeds with consent of the people!

So put down your PERT chart and put on your shoes,

Your project community needs to see you."

I was grumpy and curt, a right sour old puss

And I grumbled as I listened, thinking, "What kind of wuss

Must he think I am to set down the stick

With which I've managed so long?" I frowned at St. Nick.

He smiled in return and continued his work

Posing Problems, Dilemmas, and tales of a Jerk.

Then laying his mitten aside of my head,

I sensed there was really not much there to dread.

Then he sprang to his sleigh, like a fat Davy Crockett,

And away they all flew like an Atlas Booster Rocket.

But I heard him exclaim, as he burned off his fuse,

"You're the most powerful project management tool you will ever use!"

(This was the first piece sent out under True North's Logo: December 1996 -- blush) das