

Leading a Project Team

Leading Project Teams Training

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Minnesota
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Objectives

Leading a project team can be challenging. Often, project work needs to be incorporated into members' existing workloads. Priorities and objectives need to be defined and measured. Stakeholders may have differing goals. As a team leader, you need to motivate group members and equip them to do their best work, even if you are not their formal supervisor.

This workshop will give you tools to accomplish this by:

- Applying principles of team development to your project team
- Using appropriate team leadership strategies for each stage
- Creating a project charter
- Identifying and communicating with key stakeholders

Project Teams

Accomplishing the goals of the MnSCU Strategic Framework requires increasing collaboration throughout the organization, resulting in new goals and new ways of meeting them. In many cases, this will be accomplished by project teams. To decide if this the right approach, consider the following questions:

Is this a project?

A **project** is designed to deliver a specified outcome through the use of an organization's time, staff, and money. It has a planned set of steps and clear boundaries. It is not the same as an ongoing work process.

- Is there a defined need or identified goal?
- Does it have a clear beginning and end?
- Are there stakeholders who expect a specific set of outcomes or deliverables?
- Are there non-recurring activities or tasks that need to be accomplished?
- Are there resources (staff time, funds, equipment, etc.) that need to be managed?

Does it need a team?

A **project team** is a group of people with complementary skills and knowledge who work together through ongoing communication, making joint decisions, accomplishing a set of tasks, and motivating each other to accomplish a particular goal. It is not the same as an ongoing work group.

- Is there a common goal that requires working collaboratively?
- Is there a need for diverse viewpoints?
- Does the work require multiple skill sets?
- Are there complex issues to be considered?
- Do actions or decisions of one person/group affect the work of the others?
- Is there organizational commitment to the time and energy necessary for successful teams?

Project Teams Exercise

Identify a project team you are currently leading or involved with.

What is the goal of the project? How is this different from your normal work?

Who are the team members? What makes them a project team rather than a work group?

Stages of Team Development

Bruce W. Tuckman developed a five-stage model of team development that has been widely used to describe typical team behavior and leadership strategies.

The stages are:

- 1. Forming:**
Group members are unclear about the task and their roles and responsibilities. They are figuring out what to do, how it should be done, and how they fit in. Team members tend to be very polite and edit their comments to avoid offending each other. Little is accomplished.
- 2. Storming:**
This stage is characterized by the struggle to define the task and individual contributions toward achieving it. Subgroups may form, conflict may surface, and there is a lack of unified purpose. Team members do not trust each other enough to deal with difficult issues or constructively solve problems.
- 3. Norming:**
Team members begin to resolve their differences by developing behavior norms. They begin to develop trust and consensus about how to move forward. More is accomplished at this stage because the group has reached agreement about how to proceed.
- 4. Performing:**
In this stage, team members agree on what needs to be done and how to do it. They are able to communicate effectively, and have developed strategies for dealing with conflict. The group is visibly moving forward to accomplish its goals.
- 5. Adjourning:**
Once the task is accomplished, the team needs to celebrate its achievement and identify lessons learned. Key points should be documented to assist future groups. This is also the stage where the project is handed off to become part of ongoing operations.

Leading Teams Through the Development Stages

The role of the team leader changes depending on the group's stage of development. Strategies that are helpful and necessary at one stage can inhibit effectiveness in another.

	Forming	Storming	Norming	Performing
Individual concerns	Will I fit in?	Will I be accepted?	How can I contribute?	How can we do better?
Team behaviors	Politeness	Power bids, unproductive conflict	Collaboration, consensus	Empowerment, productive conflict
Task focus	Initiating, acclimatizing	Organizing	Analyzing data	Problem solving
Decision making	Relies on direction from leader	Team members learn how to influence	Decision making roles are defined	Key issues are addressed and team members buy in to decisions
Leadership strategies	Directing	Coaching	Supporting	Delegating

Conflict Resolution Exercise

As you might expect, conflict looks different at each stage of group development, and is resolved using different strategies. At your tables, fill in the following grid:

	Forming	Storming	Norming	Performing
Team behaviors	Politeness	Power bids, unproductive conflict	Collaboration, consensus	Empowerment, productive conflict
Leadership strategies	Directing	Coaching	Supporting	Delegating
Team behaviors during conflict				
Leadership strategies during conflict				

Problem Solving

Team problem solving includes several distinct steps. Each one is important for helping a team reach its goals.

Step 1: Problem definition

- Goal: All stakeholders need to agree on what the problem is and how to describe it
- Strategies: Talking to stakeholders and gathering data to describe the current situation

Step 2: Generating alternatives

- Goal: Listing as many options as possible; seeking quantity without evaluating quality
- Strategies: Creative idea-generation

Step 3: Evaluating alternatives

- Goal: Assessing the alternatives for feasibility and potential impact in order to focus the group's energy and achieve its goals
- Strategies: Reviewing options from a variety of viewpoints in order to select the ones most likely to lead to team success

Step 4: Implementing a solution

- Goal: Completing the team's task successfully
- Strategies: Completing the steps of the project plan, communicating with stakeholders, building a solution into ongoing work operations

Learn more:

MindTools.com/Problem Solving:

http://www.mindtools.com/pages/article/newTMC_00.htm

Asking Questions

Types of questions

1. Framing questions

- Identifies the purpose of the conversation
- Helps the group engage in the discussion
- “If we were to implement this solution by next month, what information would we need?”
- “What kind of data is available?”

2. Exploration questions

- Uncovers layers of cause and effect; “5 Why’s”
- Opens up new viewpoints
- Helps people think through problems more deeply
- “What is stopping us from moving forward?”
- “What is the root cause of this problem?”
- “What resources haven’t we used?”

3. Affective questions

- Invites participants to share feelings and reactions
- Explores the “heart” issues rather than the “mind” issues
- “How does this solution make you feel?”
- “What makes students feel so strongly about this issue?”

4. Reflective questions

- Invites the group to do deeper into an issue
- Elaborates on previous statements
- “Why do you think this keeps happening?”
- “If this problem was resolved to everyone’s satisfaction, what would that look like?”

5. Closed-ended questions

- Gathers feedback with little or no elaboration
- Useful for keeping meetings on track
- “We seem to agree on this topic; can we move on?”

Learn more:

Michael Marquardt, *Leading with Questions*, Jossey-Bass, 2005

Michael Wilkinson, *The Secrets of Facilitation*, Jossey-Bass, 2004

Leading Teams – Case Study

What does it take to spark your creativity? For Doug Dietz, the executive behind GE Healthcare's magnetic resonance-imaging (MRI) equipment, it was seeing a little girl cry.

He remembers the day vividly. He'd come to a hospital to see one of his machines in action and was initially pleased. The scanner looked beautiful and was functioning well; the technician on duty had no complaints. But just as Dietz was about to leave, he saw a child, clearly distraught, crying and clutching her parents' hands, terrified at the prospect of entering the MRI suite. When she couldn't be calmed, an anesthesiologist was summoned. That's when Dietz learned that hospitals routinely sedate young patients to get them to lie still for the procedure. The realization triggered a personal crisis. "I was so focused on the shiny object, the new features, how clever we'd been, that I missed the big picture," he recalls. He resolved then and there to improve the MRI experience for pediatric patients.

Your assignment:

- As a team, assume you are Doug. You need to develop a plan to resolve the problem and present it to the leadership at GE Healthcare.
- Describe the major elements of your plan:
 - What are the key questions?
 - How can you answer them?
 - What might the solution look like?

Adapted from:

Kelley, T. & Kelley, D. (2012) *Fighting the fears that block creativity*. HBR Blog Network. http://blogs.hbr.org/cs/2012/11/fighting_the_fears_that_b.html

Project Charters

A **project charter** is a key document used to define the project, drive its accomplishments, and measure its success. A good project charter will:

- Identify the reasons for the project
- Define roles and responsibilities for accomplishing the project
- Provide measures for the success of the project
- Document agreement with sponsors and other stakeholders

Typical sections included in a charter include:

- Overview
- Project scope
- Deliverables
- Timeline and milestones
- Assumptions
- Risks
- Roles and responsibilities
- Resources
- Success measures

Reflection

Does the project team you identified on page 5 have a charter?

Which sections have been most useful to the team?

Are there any missing sections?

When I get back to work, I will...

Project Purpose

An overview explains the objectives of the project and provides background and context. Questions to address in this section could include:

- What problems will be resolved?
- What are the opportunities and challenges?
- Who agrees that there is a problem/opportunity/challenge?
- What value does the project add to the organization?
- How does the project align with the strategic priorities of the organization?
- What results are expected?
- What benefits will be realized?
- If the project is not undertaken, what would be the consequences?

Examples

The School of Arts and Sciences is engaging in a comprehensive redesign of the freshman biology program. The project is a result of activities conducted by the Science Division review board and is designed to align the program with other freshman science programs.

This project will transform the Lab Tech program into one that:

- 1. Prepares exceptional entry laboratory technicians for positions in the community*
- 2. Delivers curriculum that responds to the way students live, work and learn*
- 3. Uses technology effectively, grounded in sound pedagogy*
- 4. Meets all requirements of the accrediting body*
- 5. Engages the community as a partner in the learning experience*
- 6. Can be delivered with current resources (faculty, facilities, finances)*

Scope

The scope describes the boundaries of the project. It should clearly define the starting and ending points. It also describes any potential deliverables or outcomes that will not be included.

A well-defined scope will be critical as the project moves forward. Consider the following:

- What type of outcomes will be produced?
- Which related systems or processes will be addressed?
- What types of data will be considered?
- Which stakeholder individuals/organizations will be included?
- Which activities or tasks will be undertaken as a result of the project?
- What activities or tasks will not be undertaken (out of scope?)

Examples

This project focuses exclusively on the Chemistry program and its curriculum. Recommendations about the College of Arts and Sciences outside of the Chemistry program are out of scope for this project.

Phase 1 will include recommendations about:

- *Chemistry program overall*
- *Chemistry program content areas*
- *Chemistry program course delivery*

This project focuses on initial research and recommendations for an electronic employee onboarding system.

1. *In scope: research and development of recommendations for required functionality*
2. *In scope: identification of additional features that can be added at a later time*
3. *Out of scope: detailed implementation plan*
4. *Out of scope: identification of funding sources*

Objectives

This section of a charter defines the high-level project outcomes and deliverables that were listed in the overview. It should provide enough explanation and detail so that the reader can understand what will be accomplished. Be sure it aligns with what is in and out of scope.

Objectives should be defined in a way that is:

Specific: Readers can understand what exactly will be accomplished

Measurable: Identifies tangible results

Achievable: Can be accomplished within the project scope and resources

Realistic: Clearly linked to problems and solutions identified in the overview

Time-bound: Associated with milestones and specific due dates that can be identified and tracked

Examples

Phase 1:

Assess strengths, opportunities, aspirations, results (SOAR) as part of a full-day team retreat

Create detailed communication plan that identifies high priority stakeholders and lists specific strategies for keeping them informed to the appropriate level

Phase 2:

Define high-level content areas and associated curriculum for the top six academic focus areas

Identify content delivery strategies (e.g., which courses will be delivered in the classroom, online, or a mix of both)

Assign faculty to lead the implementation phase for each course

Measurements

This section describes how success will be measured. There are three critical factors that affect overall project quality. They are:

- Time
- Budget
- Scope

A project charter describes the desired outcomes for each factor. In addition to a defining the project scope, typical charters include timelines stating when major milestones will be accomplished, as well as statements about the project budget.

It is important to recognize that the three critical factors are closely connected. Any change to one will affect the others, as well as having an impact on overall project quality.

Example measures (timeline):

Curriculum Project Timeline		
Activity or Deliverable	Milestone	Due Date
SOAR (strengths, opportunities, aspirations, results)	Full day workshop with consultant	9/15
Communication Plan	Draft created and reviewed by all major stakeholders	10/1
	Sponsor signs off on comm plan	10/7
Define Six Key Content Areas	Focus groups with faculty – one for each campus	12/15
	Student survey completed	12/15
	Full day retreat: Review data, define themes, associate content topics with existing curriculum	1/10
Final summary report	Report is approved by sponsors and advisors; ready to share with faculty at annual meeting on February 1	1/25

Example measures (budget):

- Current cost per student is \$5.24 per semester. The new system will result in at least a 25% savings.
- The project will be completed according to the attached detailed budget documents. Phase I has a budget of \$250,000 and Phase II has a budget of \$500,000. Ongoing maintenance costs will be \$100,000 per year.

Assumptions and Constraints

Assumptions are the “givens,” or realities upon which the project is based.

Example

All textbooks must be ordered by 7/30. Bookstore managers and faculty must follow standard ordering procedures. Late or non-standard orders may not be included in the online pre-order process.

Constraints include any factors that could affect the project’s timeline, scope, and/or budget. They could include dependencies that exist related to other projects or activities, availability of essential resources, or other factors that are outside of the project team’s control. Examples include:

- External timetables that affect project milestones
- Laws and regulations that impact the project
- Organizational expectations
- Availability of resources of time, people, skills, data, supplies

Examples

Regulations:

- All outcomes will be in compliance with relevant State and Federal regulations
- Outcomes will be consistent with departmental policies as of September 1, 2012

Constraints:

- Milestones and due dates assume that current IT infrastructure remains in place with no major upgrades
- Structural framework will be built by external vendor; delivery is dependent on reaching contractual agreements by February 1
- The final due date will be determined based on the results of current union negotiations

Funding

- \$10,000 is available for this fiscal year
- Additional funding, if necessary, will need to come from the grant pool. Applications are due on March 15 and decisions made on April 30.

Risk Management

A risk is an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives or timeline. A risk has a cause and, if it occurs, a consequence.

Examples of risks include:

- Internal: key staff members or skill sets will not be available when needed, change in available budget
- External: hardware or software not available when needed, new government regulations
- Customers: lack of input may delay decision-making, conflicts about project feasibility or scope, unclear roles and responsibilities
- Scope: lack of clarity may result in frequent changes to the charter, scope changes may result in unanticipated effects on the timeline and/or budget

Risk management

Risks can be identified at the start of a project, or at any point in implementation. For key risks, define triggers – early warning signs so that the team knows when to take action.

Responses to risk:

- **Avoid:**
I will not accept this option because of the potentially unfavorable results
- **Control:**
I will take the necessary measures required to control this risk by continuously reevaluating it and developing contingency plans or fall-back positions
- **Assume:**
I know the risk exists and am aware of the possible consequences. I am willing to wait and see what happens. I accept to consequences should they occur.
- **Transfer:**
I will share this risk with others or transfer the entire risk to them. Perhaps I can convert this risk into an opportunity

Risk Management Worksheet

Every project has potential risks to its timeline, budget, scope, and deliverables. Analyzing the risks helps the team focus its energy and minimizes the chance of negative surprises.

A risk assessment should be conducted at the beginning of a project and at key points during implementation.

Questions to consider:

- What is likely to go wrong?
- What could happen to increase success?
- How will we know?
- When will we see indications?
- What will we do about it?

Typical Approaches to Risk Management			
Impact \ Probability	High	Medium	Low
High	Avoid or Control: Detailed plan that identifies steps; allocates budget and other resources		Control: Strategy to address issues and reallocate resources
Medium		Control or assume: General plan with big-picture strategies for budget and resource reallocation	
Low	Control or assume: General plan and big-picture strategies; assign monitoring responsibility		Assume: General plan for steps or options

Transfer: This approach is optional, depending on the project

Risk Management Exercise

You and your significant other live in New York and you **both** are being transferred to California. Review the scenario and come up with a list of risks, positive and negative, associated with this project.

Use the information from the scenario below and the calendar on the next page to identify key risks associated with this project.

Scenario:

- You will close on your existing home on Thursday morning.
- The new owners of this home will move in on Monday.
- You are scheduled to pick up your moving van in New York on Friday.
- You will close on your new home on Wednesday.
- You are scheduled to begin work the following Thursday. You have to be at your job on this day or you risk losing it.
- Your significant other can start work on Thursday. This start date is more flexible but **MUST** begin by Monday. They won't be paid for any days that they don't work.
- Both of you earn \$300.00 per day.
- You are being given \$2000.00 by your companies for moving expenses. You decide to move yourself and spend \$1000.00 on the moving van, and you budget \$500.00 for gas, and \$500.00 for hotels. If you hire a moving company to do the move, it will cost \$3500.00 (you will pay the difference of \$1500.00).
- The moving van must be returned in California on Thursday. You will be charged \$200.00 a day for any day that it is late.

Risk Management Exercise

Moving Project Calendar						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				Close on your existing home	Pick up your moving van	
	New owners will move into home		Close on your new home in California	You are scheduled to start your job. You will lose your job if you are not there on this day. Moving van must be returned in California.		
	Your significant other starts work. If they miss work they won't get paid.					

Exercise adapted from: University of Minnesota Project and Change Management Collaborators

Risk Management Exercise

Identify:

- the key risks associated with the moving project
- strategies you will use to address them

Risk Management – Moving to California			
Impact / Probability	High	Medium	Low
High			
Medium			
Low			

Stakeholders

Stakeholders are individuals, groups, or organizations who:

- Are impacted, either directly or indirectly, by the project
- Have a potential interest in the successful (or unsuccessful) outcome of the project
- Have power or influence over the project

Team leaders play a critical role in ensuring the right people are involved and supporting the project. This means you need to understand the perspectives and expectations of key stakeholders. After identifying stakeholders, decide the appropriate level and type of communication they will need. The following questions can help:

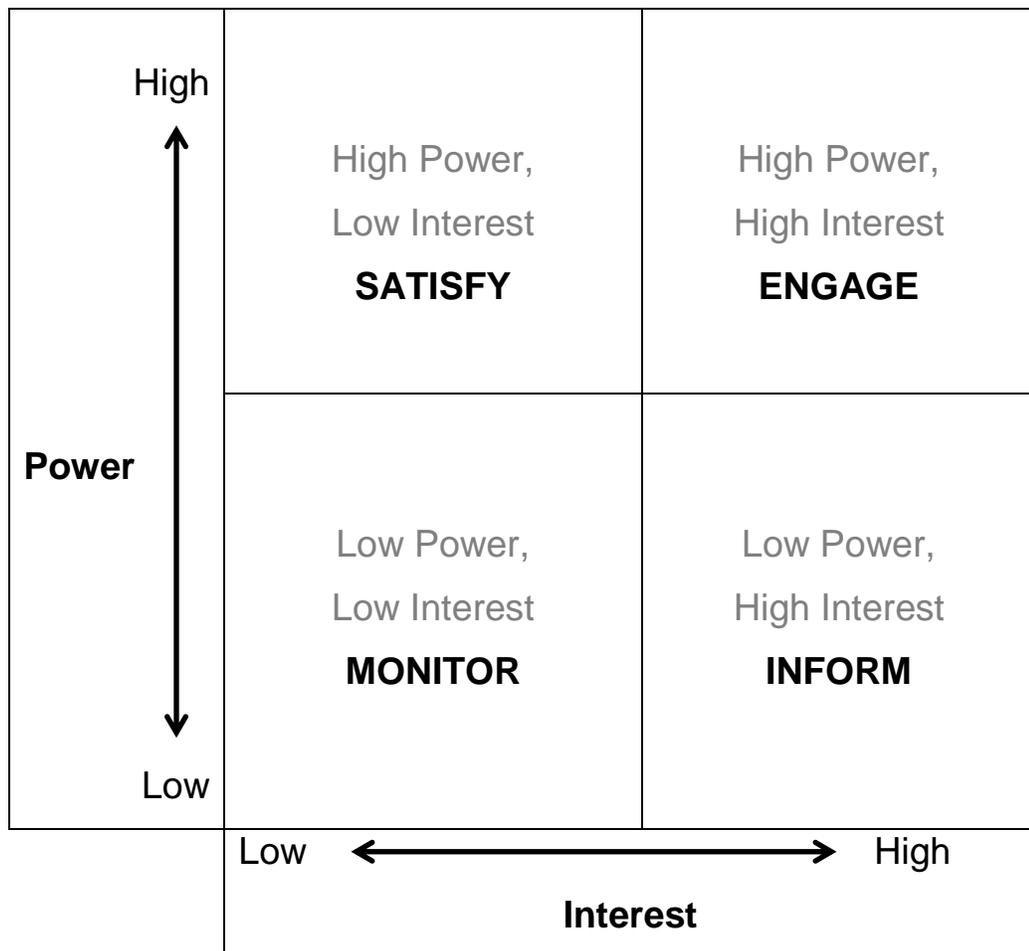
- Who stands to gain or lose as a result of this project?
- Which formal and informal leaders can influence the project?
- Who has a financial, political, emotional, or career interest in the outcome of the project?
- What are their specific interests?
- What is their level of involvement and with the project?
- What does our team need from them?

Stakeholder Analysis

Once you have identified your stakeholders, it is useful to rank them using a power and interest grid. This can help you identify an appropriate communication strategy.

Communication:

- High power, low interest: Make sure they are satisfied and at least passively supportive
- High power, high interest: Actively manage to keep them engaged
- Low power, low interest: Monitor to be sure nothing changes
- Low power, high interest: Keep them informed and supportive



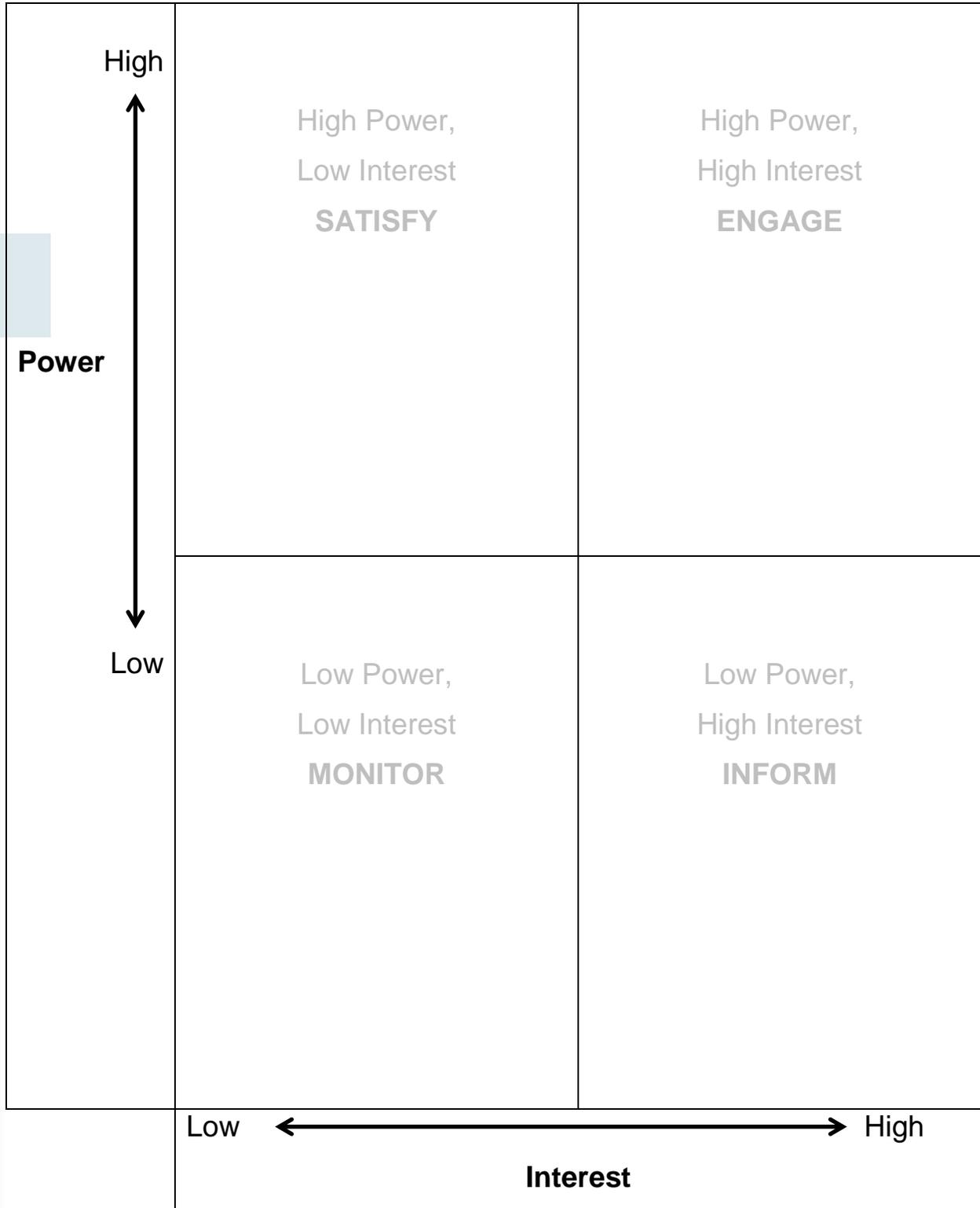
Learn more: Mind Tools: Stakeholder Analysis
http://www.mindtools.com/pages/article/newPPM_07.htm

Stakeholder Analysis Exercise

Think about the project you identified on page 5. Who are some of the key stakeholders? Write their names in the appropriate spot on the chart below.

- List some of the key stakeholders for your project.
- Write their names in the appropriate place on the power/interest grid on the next page
- How are you communicating with each stakeholder?
- Could their placement on the grid affect the communication strategy you choose?
- When I get back to work I will. . .

Stakeholder Analysis Exercise



Resources for Facilitators

References

Marquardt, M. (2005). *Leading with questions*. San Francisco: Jossey-Bass.

Patterson, K., Grenny, J., McMillan, R., & Switzler, A. (2002). *Crucial conversations: Tools for talking when stakes are high*. New York, NY: McGraw Hill.

Stanfield, R. B. (2000). *The art of focused conversation: 100 ways to access group wisdom in the workplace*. Toronto, ON: Canadian Institute of Cultural Affairs/New Society Publishers.

Wilkinson, M. (2004) *The secrets of facilitation*. San Francisco, CA: Jossey-Bass.

Web Sites

Mind Tools. Toolkits for leadership, team management, problem solving, and decision making. <http://www.mindtools.com/index.html>

Ontario Ministry of Agriculture, Food, and Rural Affairs: *Quick Reference Guide for Facilitators*
<http://www.omafra.gov.on.ca/english/rural/facts/95-073.htm>

University of Maine: *Effective Communication: Getting Things Done in Groups*
<http://www.umext.maine.edu/onlinepubs/pdfpubs/6103.pdf>

University of Wisconsin: *Facilitator Tool Kit*
<http://oqi.wisc.edu/resourcelibrary/uploads/resources/Facilitator%20Tool%20Kit.pdf>