How to Manage Chaos

Advice on project management and workplace conundrums from LiquidPlanner writer **Elizabeth Harrin**

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Every month, project management expert Elizabeth Harrin fields readers' questions about the challenges, risks, and rewards of project work on the LiquidPlanner blog.

We've compiled our favorite columns in this ebook. Over the next 30 pages, you'll get Elizabeth's take on topics ranging from managing teams and expectations to keeping secrets from clients.

Have a burning question for Elizabeth?
Send an email to marketing@liquidplanner.com with the subject line "Question for Elizabeth".

About Elizabeth

Elizabeth Harrin, MA, FAPM, MBCS is Director of Otobos Consultants Ltd, a project communications consultancy specialising in copywriting for project management firms. She has over fifteen years' experience in projects. Elizabeth has led a variety of IT and process improvement projects including ERP and communications developments. She is also experienced in managing business change, having spent eight years working in financial services (including two based in Paris, France). Elizabeth is the author of Shortcuts to Success: Project Management in the Real World, Collaboration Tools for Project Managers and Customer-Centric Project Management.

She also writes the award-winning blog, A Girl's Guide to Project Management. You can find Elizabeth online at GirlsGuideToPM.com or on Twitter @pm4girls.

What Comes First—the Process or the Tool?

Dear Elizabeth: Process or tool—which comes first? Our executive team disagrees about this every time we evaluate our project and work processes and start to consider software tools—current and new ones. I fall on the side that process comes first, then you use the right tool to support it. Others argue that you get the right tool and processes fall into place. What are your thoughts? – *Process Fan*

Dear Process Fan: Which came first, the chicken or the egg? I think in this case that you're both right. Or wrong. Whichever way you want to look at it.

Tools are often built around industry-standard best practices. Adopting your work processes to align with the way the tool works can add efficiencies. However, every business has its unique quirks, and you might find that there's a particularly critical process for you that isn't an out-of-the-box feature.

If you were starting from scratch, I'd say that a tool can really help you setup your business for success, as the built-in processes will kick start your own project management approach.

Since you're not starting from scratch, I would say that an iterative, evolving approach is the best. Accept that your business process may have to change to suit your tool, but where your processes are "better" than what your tool provides (whatever "better" means for you) then you may have to customize the solution to make it work smoothly.

Your challenge now becomes being able to help your executive team move beyond the processes/tools discussion and towards one that revolves around outcomes and business value. When you focus on your end goal – something that you do have in common! – you're more likely to have productive conversations about how to get there.

Look for a tool that is going to grow with you as your needs change over time. You're going to have to tweak both your processes and the way you use your software to get the best performance for your team.

How to Keep Your Job

Dear Elizabeth: Budgets are getting cut at my current job, and I'd like to stay around! I work as a senior-level project manager in an IT organization. Do you have any advice or wise tips on actions I can take to make myself more valuable to my team? – *Love My Job*

Dear Love My Job: If budgets are being cut now, it might be too late. But let's plan for the best-case scenario and talk about what you can do to quickly show yourself as a really valuable member of the team.

First, make sure you are solid at the basics. Follow through on actions. Deliver on your promises. Be the safe pair of hands. If you have outstanding tasks, or people are waiting on you for things, smash through your list.

Second, cultivate a positive attitude. No whining, gossiping, or moaning. Be a ray of sunshine for your office without being fake about it. People like to work with positive people.

Next, be assertive with your helpfulness. Be helpful and serve your colleagues, but without being a pushover. It's great to show willingness; just don't end up being the office doormat. Don't worry that saying *no* sometimes will disadvantage you when it comes to the selection process. As long as you do it politely and with reason, it's a show of assertiveness.

Finally, if you aren't doing it already, think big picture. As a senior-level project manager, you should be always acutely aware of the business context of your projects and actions. Working in IT can get a bit siloed at times, so think about how your objectives fit into those of the business overall. And then, make sure people know you are thinking. Find ways to demonstrate that you know how your piece of the business links to others and how your work adds value to the company.

Be awesome! And cross your fingers.

Riding the Productivity Roller Coaster

Dear Elizabeth: I run a product team that responds to seasonal demands, and our output fluctuates. We have times when we're very busy and then a couple of weeks where it's slow. There's always work to be done, but when demand ebbs, people's productivity and engagement does as well. How do I keep my team engaged and motivated during these slow periods?
– Riding the Productivity Rollercoaster

Dear Riding: Let me be a little bit controversial here. How much does it matter if your team has a slow period? If demand is down, and that's affecting their engagement and motivation, unless they are being downright unprofessional, perhaps you could cut them some slack. It's hard to remain 100 percent motivated every day of every year, and engagement wanes too.

Not having an interesting piece of work to do is naturally a bit demotivating but that doesn't stop them switching to "motivated mode" as soon as the next big assignment comes in. As long as they aren't using your resources to print out copies of their resume, then maybe you want to let them off. Think of it as time that they are using to recharge their batteries until the next busy period.

> “As long as they aren't using your resources to print out copies of their resume, then maybe you want to let them off.”

Having said that, I know why you want to keep the team engaged and motivated, so let's get back to your question. The first thing to look for is whether there is a pattern. Can you predict when the slower times will be? If so, think ahead and start looking for activities to fill the gaps. These activities might not be what you might call true work but you could organize a staff conference, a team building event, or schedule some professional training for the team. It's also a time for cross-skilling, where team members can teach each other their particular expertise. That way, you'll have more cover for vacation and sickness, as well as a broader skill base in the team.

It's hard to give a blanket recommendation for how to motivate people because everyone is motivated by different things. Some may appreciate the ability to take some extra time off in lieu of hours worked during the busy times. Others may find motivation in being asked to step up and take on more responsibility, such as helping to plan the next big push. Tasks that might take longer if someone less experienced did them would be good to schedule in the slow periods too, as a way of building confidence and leadership in the team.

Starting Projects too Soon

Dear Elizabeth: I work on a product team with a very efficient manager—too efficient! In her efforts to make deadlines, she often has us start early on work—before we have all the requirements. It feels productive at first. But as requirements change, we end up going back and redoing or fixing work and start to fall behind. And we look bad. I've tried talking to my manager, but she still has us do these early project starts. She doesn't understand that waiting for full requirements actually saves time. Advice? – *Frustrated*

Dear Frustrated: That's a hard one. The issue isn't the early starts, but the fact that she doesn't listen to you. It's great that she's efficient, but her method doesn't work. You've offered constructive advice, which she has ignored. So let's think about some ways to get her to take your advice seriously.

First, would it be more effective coming from someone else? Please don't take this personally, but it's often the case that individuals are influenced more by their peers or managers than their subordinates. While it's grating to think that if she heard the same thing from a peer she'd act on it, when you've been telling her and getting ignored, the end result is the same and it's a win for you. So if you can take your own ego out of the situation and work on ways to influence her through the people she listens to, that could work.

It might be hard to approach her boss, but if you have relationships with other managers who could take your side, then that's a route to try.

Another option would be to ask your customers to provide feedback. Maybe she'd listen if she heard it directly from them? You don't have to be blunt about it: do a client survey and ask what went well and what didn't, and try to get some commentary around how they felt about the delays and what they felt could have been done differently to avoid those.

Finally, (and this can be a risky approach!), just say no. "Thanks for the suggestion that we start work now, but I'm going to wait until we've got the full requirements. That will be at the end of the month so what I can work on before then is X, Y, and Z to be totally ready."

This approach is one that I wouldn't advise in all cases. Also, I don't know enough about your workplace culture and your boss to know if it is going to be suitable for you – but you'll know if you or a more senior colleague have enough confidence and credibility to pull it off. Directly challenging your boss in a nice way might get the result you're after.

As a general comment on saying No to your manager, I speak to a lot of people who would never dare challenge their boss. But they are just human, like you and me. Be empowered and take responsibility for your own success, and be excellent in the work that you do. If your manager challenges you back, go with it and put your objections in writing (nicely) so you've got some kind of comeback if they then blame you for the late finish later.

Good luck!

How to Get More Resources

Dear Elizabeth: I'm currently running a large project that's a mess. We've lost team members, the customer has asked for more features, and now we're scheduled to go well over our deadline. I've had endless conversations with my manager about the need to add more people to the project—I've even shown her my resource workload report. For some reason she won't budge. How do I convince her that adding headcount is in the best interest of finishing this project—and our business? *–Frantic*

Dear Frantic: Oh, I've been there. I feel your pain! A good way to do it is to stop talking about people and start talking about money. It feels like a no brainer to add a $30k project coordinator resource to a project that will deliver $1m of benefit every year because if you can deliver faster, you get the benefits faster.

Large projects tend to have significant benefits, either tangible or intangible, so you might have a better argument around increasing resources than people working on smaller projects. If your project has no financial benefit, it still might have a significant risk. For example, how would it sound if you could add a $30k developer to the team that would help prevent you from incurring a multi-million dollar regulatory fine? Even projects that are being done for legislative or compliance purposes have a financial spin that you can put on them.

Failing that, you might have to put the project on a Red status. Red typically draws management attention, and you're doing the responsible thing of flagging the point that you do not have the ability to deliver on time. You could enlist your customer in putting pressure on your manager if that's appropriate.

By the way, just because a customer asks for more features, you don't have to deliver them in the same timeframe. Customers – internal and external – will often try to get more work done in the same time, thinking that your resource is elastic. They'll know that isn't truly the case and could be sympathetic to you needing more time if you can't get the extra hands to help.

> "Just because a customer asks for more features, you don't have to deliver them in the same timeframe."

How to Manage Chaos

Dear Elizabeth: I work on a team that's always in a state of chaos. We've tried different organizational processes, task management software and tools. How do you know if you have the right project management processes and workflows in place? –*Perpetually Disorganized*

Dear Perpetually Disorganized: Being in a state of chaos is a sign that you don't have the right project and work management processes in place.

I know a couple of teams who work excellently together, and yet from the outside it looks like chaos to me, so the first thing is to establish what you think "not chaos" looks like:

- Is it one where everyone knows what to do, and has their priorities straight?
- Or do you want to be able to find documents within three seconds of someone asking for them?
- Is the right workflow one where you can forecast your work for the coming month so that everyone knows what's planned?

It's probably a mix of all those things, but only you are going to know what will feel like nirvana for your team. Here's where to start repairing your process:

Focus on one of your problems to fix, either by giving one of your processes another try (perhaps with a few tweaks) or trying something new. Once that area of chaos is under control, move on and try to bring some order to another area. Trying to change too much at once is a recipe for a different kind of disaster, and it will unsettle the team to the point that it undermines what you are hoping to achieve.

Finally, you'll have to accept that what is billed as "the perfect process" might not work for you. If you can't make a best practice work, then change it. Tailor your software and processes so that they help, not hinder, you. That's a process of continuous improvement. If you work closely with your team to identify what is working and what needs to change, then you can deliver incremental improvements and slowly bring that chaos under control.

Preparing for the Fourth Industrial Revolution

Dear Elizabeth: My company's management team is talking a lot about the incoming Fourth Industrial Revolution, or Industry 4.0. I'm hearing a lot about how we're going to have to increase productivity and flexibility in our processes. As a product team manager this sounds exciting, but I'm not sure what to do to prepare. Advice? –*Lagging Behind*

Dear Lagging: Industry 4.0 is all about the Internet of Things and bringing computers and automation together in an entirely new way. It's pretty cool, and it's great that you are thinking about it now.

Being more flexible and increasing productivity is something that managers through the ages have aspired to. The reason we have robots on manufacturing lines is because someone wanted better productivity than what could be achieved with human workers. So in many respects, the ideas are things that you've been subconsciously aware of for some time.

I would start by looking at the flows of work in your area and around your product. Approaches like Six Sigma and Lean can help here: Ultimately, you are trying to find duplicated effort and waste in the process so that you can strip it out. I've always thought that was a good starting point, but it doesn't go far enough. Sometimes you'll need to totally re-engineer a process to make it incrementally more productive. Your team might already have some ideas about how to do that. Why not ask them?

"Ultimately, you are trying to find duplicated effort and waste in the process so that you can strip it out."

Aside from that, think about the tools you use and how they are going to support you. Software like LiquidPlanner allows you to stay flexible and shift between priorities, so make sure that you have the underpinning infrastructure and systems to meet the demand for flexibility when it comes.

Setting Goals

Dear Elizabeth: It's that time of year again—reviewing the year gone by and preparing for the new year's goals and commitments. I could use some new ideas to get myself and my team excited about reviewing what they've accomplished and using that to set up some goals they're excited about. Any tips? – *Goaltender*

Dear Goaltender: First, congratulations on caring enough about your team that you want them to be excited about the coming year and what they've achieved. Far too many people in your situation see end-of-year reviews as a bureaucratic process to get through before they leave for the holidays. So, kudos to you!

I find that team members have short memories and will often only bring to the table things that they have achieved in the last few months. You could give them a template that says things like:

- In March I achieved . . .
- In April I delighted this customer . . .

And so on. Ask them to go through their project plans, notebooks, and emails to find the examples if they don't immediately spring to mind. There are a ton of achievements stored in their project management software so they will be able to find something, I promise.

As for 2017, you could think forward and ask them to imagine what their 2017 end of year review would look like. What do they hope they have achieved? What projects would they like to have worked on, or what skills would they have developed? This can help build a sense of interest in the coming year.

Finally, use the end of year conversations with your team to share with them as much as you can about the wider business plans. People are inspired when they know they are part of a company that is going somewhere. Talk about the plans you have for new clients and new projects and business developments. Show them what they could be part of over the next 12 months.

> "Use end of year conversations with your team to share as much as you can about the wider business plans."

Juggling Multiple Projects

Dear Elizabeth: I manage a team that that is always juggling multiple project tasks. How can I keep my team focused on their top priorities, and help them know what the latest priorities are? – *All Over the Place*

Dear Place: Welcome to my world! Juggling is the norm, I'm afraid, but it's great that you've accepted it, and you're looking for ways to keep the focus.

The first question, and forgive me for asking, is: Do you know what the priorities are?

If you do, it's a far easier job than trying to work them out. Let's assume for now that you are clear on what the team needs to do to complete their projects successfully. (If not, find out what they are and then apply the following tips.) Here are three tips to help the team stay focused.

1. **Keep in touch**
   There's a balance between micromanaging and staying on top of the work, but try to find it! Keep close to the team so that you can steer them in the right direction. Daily stand ups (even if you aren't an agile team) are a good way to check in and make sure everyone understands what the priority is for the day.

2. **Explain the priorities**
   Don't just tell people what the priorities are. Explain why. This gives people some context so that if they can't work on the top priority for whatever reason (say, they are waiting on a colleague for information) they can make better decisions about what to do instead.

3. **Stop the distractions**
   As a project manager or team leader, you are the one to shield the team from annoying distractions. Keep them out of office politics, protect them from the day-to-day headaches and give them the space and the tools they need to do their jobs to the best of their abilities.

Hope that helps!

Protecting My Team from Being Randomized

Dear Elizabeth: My team members are constantly being pulled away to help other teams with their projects. I can't say anything because the requests often come from upper level management. How can I protect my team from being randomized? – *The Randomizee*

Dear Randomizee: This is such a frustrating problem. You thought you could deliver by next month, and then suddenly your key resource is gone. Cue a huge reschedule and an unhappy sponsor (not to mention the upheaval in the team).

This comes down to not having clear priorities between projects. If your project is the most important company initiative then your resources are secure, because executives and stakeholders will be aware that it has to happen.

There are two things at play here: having those priorities in place, and people respecting them.

First, get the priorities clear. You need someone to look at the portfolio of work and prioritize the projects—someone from your Project Management Office or a team manager. This person needs to give each project a clear ranking, so that everyone understands where each initiative fits in the grand scheme of things.

> "There are two things at play here: having those priorities in place and people respecting them."

Second, respect the rankings. That means that if someone tries to pull your resources on to another project, and that project is less important than yours, you have something concrete backing you when you say no – even if the person is more senior to you. If the requester doesn't listen to you, the overseeing project manager will back you up and you have the escalation route.

This also means that you have to respect the rankings. If someone needs your key people for a project that is more important than yours, then you must acquiesce. After all, you all work for the same company and it's the company's success that's important. When a more strategically-driven initiative needs extra hands, everyone should rally to make that happen.

I know this isn't an easy answer, but it's the cleanest way to stop the act of randomizing people and breaking up teams at the whim of executives.

How to Open a Meeting

Dear Elizabeth: What's the best way to open a meeting? I just started leading a project team and I often feel awkward at the very beginning of our weekly meeting, especially since I'm trying to gain the trust of my new team. Do you have any good opening lines, or best practices? –*New in Town*

Dear New in Town: "Shall we get started?" is probably the opening line I use the most! That's a good way of bringing people to order without having to tap a pen on the side of a glass. Also, speak a bit more loudly than normal if the room is buzzing. People come together in person in meetings and sometimes haven't seen each other for a while. They use the downtime at the beginning of the meeting and in breaks to catch up and often talk about problems that don't affect everyone else in the room. It's good to encourage that kind of chat as you'll find it's the informal discussions that often lead to more work getting done.

If your meeting is a virtual team meeting and you're on the phone, then start with something like: "Hello everyone, it's New-in-Town here. Let's see who we've got on the phone before we kick off. Did I hear Old Hand dial in?" Then check off your attendees.

If you haven't got everyone together, whether you're meeting in person or virtually, you have two choices: Either hang on for a bit, or carry on and let them interrupt you later. I make that decision based on who we are waiting for and who is doing the waiting. For example, in a room of senior managers who are hanging around waiting for someone I could catch up with afterwards, I would go ahead and start. If the person missing is the project sponsor, then I'd wait and see if s/he arrives in the next few minutes.

Either way, don't let the people in the room hang around for more than a couple of minutes because it's disrespectful of their time and tells them that it's OK to be late next time.

Hope that helps!

Making the Reporting Process More Efficient

Dear Elizabeth: I have to run countless reports a month—for my boss, our customers, my team, anyone else who asks. I know they're necessary but they take time and take me away from the work I need to do. Is there a way I can either cut down on the reports or make the process more efficient? In other words, what am I missing? – *Reporting to Death*

Dear Reporting: Ah, reporting. I've been giving this a lot of thought recently and streamlining reporting is the single best way I can come up with in my own workload right now to buy me back some time.

Automated project management software is the way to go, if you aren't already there. These tools are, however, only as good as the data you enter (estimates, time logged, etc.).

The huge benefit of having project management software that holds all the right data is that you can set up your own dashboards or template reports and then run them whenever you want with a single click. The software extracts the relevant information for you, saving you from the ever-increasing circle of having to get more data. You can then tweak if necessary, but it's far faster having the bulk of the content already done for you.

> "Automated project management software is the way to go."

The other, non-technical thing that you can do is to make sure that you adequately understand why people are asking you for reports and making sure that you hit their expectations and timeframes. This will also help you to bundle reporting outputs together. For example, if you find out that a couple of your requesting sponsors have the similar requirements, then you can do a special version for them.

Personally, I'm not a great fan of different reports for different audiences as I think it provides too much opportunity for moving away from one version of the truth. Still, if you have to do them, you might as well automate and consolidate as much as possible!

Getting the Team to Use Ranged Estimates

Dear Elizabeth: I work on a project team for a manufacturing company. For the last year, we've been using ranged estimates to build out our schedules. For the most part, our customers love it. We have one customer who is putting up a fight, saying they want a hard deadline. How do we convince them to go with a two-point estimate? *–Living in Reality*

Dear Reality: Ranged estimates are awesome, so I'm totally with you on that one. I'm not surprised that most of your customers love the way you schedule.

I would start a campaign of education: Talk to your customers about why two-point estimates are actually a more mature and realistic way of scheduling and why that should give them more confidence. Talk about transparency and managing risk. Talk about why your other customers like it and the benefits that they have seen because they've used dynamic planning. Using case studies and real examples are also a winner when it comes to convincing others.

In this conversation go back to the beginning, and talk about why your customer chose you: because your company has a mature and professional approach to doing the work, supported by cutting-edge tools and methodologies including ranged estimates, which puts you ahead of competitors (and by association, gives them a boost too).

In the event you fail to convince your customer to go with ranged estimates, here's something to consider. Could you use ranged estimates for your internal planning and then only publish the later of the two points to your client? They'll get the worst case scenario but it meets their requirement of a single date and gives you the flexibility to use ranged estimates as you intend.

And if you come in earlier, you'll have fair notice to let them know. They might even be pleased about it!

Stepping in to Manage an Ongoing Project

Dear Elizabeth: I've just taken over a long-running project from a PM who's left the organization. This is my first time stepping in to an ongoing project. I have to learn the history of the work progress, the team, the customer. It's overwhelming, and I worry I'm over my head and going to blow it. Can you tell me how and where to start, especially in a way that I can build trust and respect from my team? – Over My Head

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Dear Over My Head: First, you are not going to blow it.

Second, I wrote a guide about taking over a project that includes a free checklist. It covers all the tasks you need to do to pick up work from someone else. So go and get that, I'll wait...

Now you've got the guide in hand, let's think about how you can take over the project in a way that builds you trust and respect.

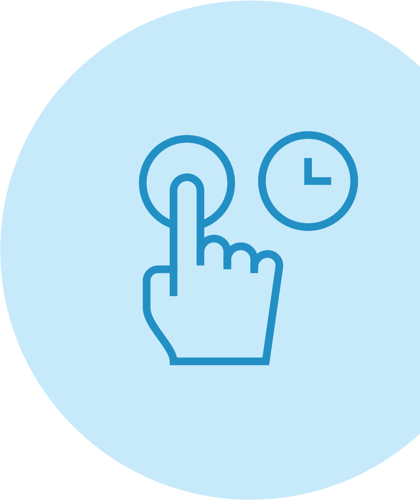
Being honest with the project team will take you a long way. Be straight with everyone about the fact that you need time to get up to speed and that you need help to do so. Don't ever pretend that you have all the answers as I bet your team members are more technically versed in what to do than you are at the moment, and they will see through any blustering and attempting to know more than you do.

“Being honest with the project team will take you a long way.”

Make building relationships a key part of your strategy to take over this work. Try to get to know the people on the team and their areas of expertise. Ask how you can help them and then do it (if you can't, go back to them and explain that you tried and why you weren't successful).

I'd highly recommend a book called *The Accidental Leader: What to Do When You're Suddenly in Charge* by Harvey Robbins and Michael Finley. It's easy to read and really inspired me to step up when I found myself in a leadership job, which is where you are now. Give yourself three months, and you won't remember what it felt like to be in over your head because you'll have it all in the bag. Trust me :).

Time Tracking Woes



Dear Elizabeth: My team manager is on a rampage to have us all log and track time. Part of me understands why but another part of me feels like Big Brother is watching. Is there a better way I can look at tracking my time—like, ways it can work for me? *–Resisting in Roswell*

Dear Resisting: For a start, Big Brother isn't watching. Everyone has far too much actual work to do than pour over your timesheets to find out whether you took 30 minutes or 45 minutes as a lunch break. That is, assuming you have nothing to hide and are hitting your targets and delivering on your project!

Look at time tracking as a personal tool to help you be more effective. For example:

- How good are you at estimating? Timesheets will help you understand whether your estimates are realistic because you can compare your project schedule against the work you actually did and see whether there's a gap.
- You can see where you spend your time. I know I spent time on social media sites throughout the day, but if I tracked it I bet I'd see it is longer than I expected. Time tracking will help you see exactly what you are doing each day, which is the first step to doing things differently.
- Your company can charge your clients more. I know of one company that boosted their profits by about 50 percent because they could charge clients accurately. Previously people weren't recording their time accurately and clients were being undercharged.

To put your mind at rest, talk to your manager about why they're introducing time tracking. When you understand the goals, you're more likely to feel that tracking time has some advantages – and I bet they aren't doing it just to check up on you.

Finally, I'm sure there are other people feeling like this in your team. You'll do everyone a favor for starting an honest conversation about how people feel about timesheets. In turn, this will help ensure that if you do start tracking time that the results are meaningful and that everyone feels good about it.

Keeping Secrets from Clients

Dear Elizabeth: I'm in a bit of a pickle. The project I'm currently managing is not going to make the delivery date because a handful of developers got moved to another project. But my boss has told me not to say anything to the client—yet. Well a week has gone by, and the client keeps asking me for updates, and I find myself having to spin one white lie after another, which I hate. How do I proceed in a way that I can be honest, and make the client and my boss happy? — *Uncool Cucumber*

Dear Uncool: Goodness, I don't envy you. In some situations it's fine not to say anything to a client straight away, say for example, if you expect to be resolving the issues imminently so that their project is not going to be affected. Let's not stress clients out for no reason. If you can deal with the problem and keep them out of it, then great.

But that isn't happening in your situation. I think a week is plenty long enough to keep this client in the dark about what is potentially a showstopper for their work. They might have a big launch planned, and if you can't keep your company's side of the bargain then ultimately the relationship with this client will be damaged longer term (an unscrupulous boss might even blame you for losing the client).

I would tell my boss that I am going to tell the client. He or she needs to support you in making sure that message is a pain-free for the client as possible. In other words, they need to help you find some extra developers. Could you buy them in? Could you get them back? Could you pay them overtime?

Take a few suggestions to your boss. They will all cost money but you can offset that against the cost of bad publicity, reputational damage and the cost of losing the client. Ask your boss to approve a solution that helps you get back on track.

If they won't, I would still tell the client. Be honest and explain your resourcing problem. Ask them for help with resolving the problem, and see what they can do from their side to put pressure on your management team to free up additional resources. They can escalate it within their management structure and that will come back to your boss eventually. It will be uncomfortable. But you'll have done the right thing for the project, for your client and for your company.

Those *#$(&! Deadlines

Dear Elizabeth: I'm project managing 100 projects (seriously), and struggling. The main thing is deadlines – we have a fixed project deadline, but it's largely in the control of our customers as we require information/feedback from them during the project.

How can I set a deadline so that I can see the original due date of the project, track how much time we've been actively waiting for a client to respond (so that inevitably when they ask "what's taking so long" I can prove it's the amount of time I've been waiting for them), and see how often we've had to shift the deadline and when? – Frazzled

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Dear Frazzled: 100 projects! Good grief. When the responsibility for getting a task done is being passed among different groups, you can use workflows to manage the handoffs.

One of the best ways to do this is to offer your clients transparency over your project schedules. You can do this with online project management tools: Just set clients up as users with the permissions that are appropriate. Create tasks and name them explicitly, something like "Client review." Then also add your client as a resource to the task to make it really visible. If you keep your schedule up to date you'll be able to see when these tasks start and end, and work out the total waiting time that has been added to your plan as a result.

I would also schedule in follow-up time every week. You can either automate this with alerts around incomplete tasks (or your PM software might flag tasks that are at risk). But you can also block an hour in your calendar each week to follow up with clients for any outstanding tasks. Of course, you can do this in your planning tool if it allows for commenting.

If you're not working with clients in a collaborative tool, then you can create templates to use for emails that communicate that the task needs input before moving forward. Plus, you can include a helpful "if you need any more information, just give me a call." Normally I'd suggest calling each client individually but you can't do that with 100 projects so the more you can copy and paste to save yourself time the better.

And to wrap this up, a few things to consider: How much notice do clients receive that you will be asking them for feedback? If the kinds of projects you do are relatively repetitive, you should be able to predict forward when you'll need their input and give them warning. Can you create a calendar of important milestones when they'll be receiving data from you so that they can anticipate and plan? Your clients might be more responsive if they know what's expected of them in advance.

As for seeing how many times you have had to shift the deadline: Look into using baselines on your project schedule. Baseline reports are a huge help in working out when your dates changed, and they'll help you see how often you had to make a change to reach your final milestones.

Managing Client Feedback

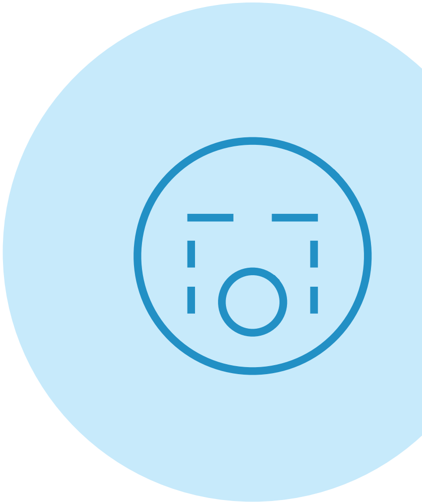
Dear Elizabeth: I work on a project team that doesn't seem to learn from experience! Every schedule we create always assumes the best case scenario. How can I break my project lead from doing this and getting us in a bad situation down the road (not enough time or money; working over-time, letting down the customer, everyone is grumpy?). – *Grumpy*

Dear Grumpy: It sounds as if your team isn't that great at estimating. Try doing something different before your estimates get put into your project schedule: three-point estimating would be a good tool to introduce to the team if you haven't used that before. Sell it to them as a way to build more realistic schedules that are based on best case/worst case estimates. You can use LiquidPlanner to put ranged estimates into your schedule and then manage the tasks in the normal way.

As well as taking a fresh look at how your team produces (realistic) estimates, have you spoken to your project lead about their track record? This is an opportunity to offer them some coaching. It's wonderful that your project lead is so confident and optimistic, but with all the risk factors inherent in technical projects and the resulting uncertainty, their track record is letting them down. The end result is that people end up working more and projects are late and expensive. Your PM might genuinely not be aware of the link between their poor attempts at scheduling and the pressure the team is under towards the end.

Finally, look at contingency. You can add this to tasks or project phases or even to the project overall. Contingency can be in the form of money or time or both. It's not part of your "normal" project resources and if you don't use it then you should hand it back. Consider it a cushion to catch you if you fall: While the team adjusts to producing more realistic estimates then this can be a useful way to minimize the impact of getting it wrong. Reduce the contingency as you get better at hitting your schedule. And good luck!

My Boss is Burning Us Out



Dear Elizabeth: I have a boss who makes a habit of overcommitting my team to projects that require more resources than I have and deadlines that aren't reasonable. I'm always told to just "make it happen." I manage the team and do my best to keep morale up when people have to work overtime, etc. But you can only do so much. I see my team members burning out and a few of them have found new jobs. How do I convince my boss that his demands are unreasonable? – *Exasperated*

Dear Exasperated: Does your boss know that this behavior is causing people to quit? Perhaps it's time for some home truths.

The problem with being a superstar at delivering is that people expect you to do it all the time. It's fine to pull out all the stops for a critical business project where everyone understands the urgency. But it's not fine to put people under unrealistic deadlines and increase the pressure as normal working practice.

Burnout isn't sustainable, so something has to give. I suggest it has to be your boss's expectations that give, and not your team's health (or your own—I imagine it's not great for you either).

However—bosses like yours aren't the kind of people who will respond well to emotional pleas for extra resources or longer deadlines because "the team is tired." But your boss might respond to facts. Plan your schedule and work out the resources required based on his deadlines. Then do the same based on the resources you actually have. Show your boss. Compare the two.

It takes courage, but you need to tell your boss that you can't magically deliver projects from an overworked team with low morale. Say no. Tell him what you need in order to hit the deadlines.

Of course, you do need to use your professional judgment. You can't say no every single time, especially when the project is business critical. You could factor in overtime already to your plan – make some concessions and explain how you have already accounted for the extra you can expect from the team.

Your boss will probably still ask you to work miracles. Document everything, including minutes of meetings where you say you are unable to achieve the deadlines with the resources you have. Put your project on Red. Log risks and issues like there is no tomorrow. That's your job: monitoring, controlling and tracking the project and escalating when something isn't going according to plan (even though the "plan" was fictional to begin with). It also gives you a trail of proof when you truly can't deliver—you have something to support what you've been saying the whole time.

You've got this!

Troubleshooting Remote Teams' Communication Troubles

Dear Elizabeth: I work on a remote team that's spread all over the world practically! Both coasts of the U.S., Europe and Asia. Even though we have a cloud-based project management system that anyone can access from anywhere, there's still a lot lost in translation. Sometimes I feel like we spend more time trying to clarify our communication—requests, bugs, feedback—than making substantial headway. Do you have any advice on how to handle geographic and cultural barriers to working remotely?
– *Communication Breakdown*

Dear Communication: Can you get everyone together for a special kick-off event? That can really help cement relationships on the team and get everyone on the same page for project communications.

However, let's assume that you can't for now, because that's the situation that many project managers find themselves in.

First, strip back how you are communicating to the very basics. Stop using project-related or cultural jargon. State expectations clearly, and use the facts. It's impossible to expect someone else to take a task as a priority if you state it as: "When you get a moment can you look at the risk report for the software changes please?" In my world, that means: "Drop everything and review it now,"—but that's a culturally-specific interpretation particular to my team!

You could also drop English as the main language for communication when a discussion between native speakers of another language has to happen: Don't impose English as the language of the tool when it's hampering communication.

Next, think about how you can stop using words and start using visuals to communicate instead. Clarify your requests with screenshots, graphics and videos of the bug that you upload instead of a long text description.

Finally, take some time to understand how your team members think and respond. The best way to do this is to simply ask. Try to get closer to their culture and working practices. It will help you establish whether cultural differences are holding your project back or if it's something as simple as the language barrier.

When You Don't Get Along With A Teammate

Dear Elizabeth: I have a teammate that I don't get along with—we don't see eye to eye on solutions. One of us is quiet and the other is loud, and we just get on each other's nerves. We're usually buffered by the rest of the team, and we can tolerate each other. But now we've been assigned to collaborate on a project together. Do you have any advice on how to work effectively with someone when you don't get along? – *The Quiet One*

Dear Quiet One: First, you don't have to like someone to work with them. You just have to be professional.

Secondly, does your teammate feel the same way about you? He or she probably does, but a coffee and a chat to get everything in the open can be a huge help. You need to understand each other's working preferences because if you can put yourself in the other person's shoes, you're more likely to tolerate each other's behavior.

You could also talk to someone in HR and ask what sort of psychometric tests they have available for staff to complete. These are often used on management or leadership courses or during the hiring process for new recruits. The Myers-Briggs Type Indicator (MBTI) is a good one to try to do, although you both need to be open to taking it.

A personality inventory like this doesn't prefer one working style to the other; it simply makes you more aware of your own working preferences and that of the other person. You can have conversations about how best to work with each other based on a common understanding of your own preferences. The results can also show you how you can work together: Certain MBTI profiles do clash with others, for example, but not in a way that makes work impossible.

The bottom line is, the more you understand how the other person is thinking and why they work the way they do (because of the person they are) the more you can both adapt your styles, be sensitive to the others' needs and be tolerant of the behavior that really annoys you.

Plus, make sure you have someone at home whom you can have a good moan to from time to time!

GTDing as a New Project Manager

Dear Elizabeth: As a new project manager at a startup, I've found it's difficult to balance *what just needs to get done* versus *what needs to be planned out* versus all the other hats I need to wear. What is your daily or weekly routine is to keep everyone and projects on track? – *Bianca*

Dear Bianca: Excellent question! You sound very busy. But I'm afraid there's no secret formula for balancing your time. You simply have to apply your professional judgment every day and prioritize the most important things.

But—since you asked, here's how I do it.

I break my time into chunks and might spend half a day each week on the "just need to get done" tasks. It's focused time where I can plough through emails, filing, my action log and whatever else falls into that category. If possible, I group similar tasks together as they're faster to do in a batch.

The "what needs to be planned" work is something that I need to focus on without distractions. To do this, I'll book a meeting with myself and often go somewhere that isn't my normal desk. That's partly so that people can't find me, but also because a change of scene helps me think. It also means I don't have the distractions of invoices on my desk, or the phone ringing. I prefer to do planning either early in the morning before the day really starts or after dinner with a glass of wine.

Like you, I have other hats to wear at work and at home. One central list of tasks helps because it lets me see what I have on the go and also what other people have signed up to do. I can filter the list on resource name so that I have an at-a-glance view of what I need to get and from whom. Using a project management software tool is another way to track everything going on, and probably a better option than an ordinary task list. A PM tool lets you add in dates to your filters so you can see what deadlines are coming up.

> "Apply your professional judgment every day and prioritize the most important things."

Oops—Miscalculated Scope!

Dear Elizabeth: Last week my team had one of those "didn't see it coming" moments, where we miscalculated scope and found ourselves in need of more time and resources to deliver the original project. How do we present this to our board, and let them know it won't happen again?
– Tail-Between-Legs PM

Dear Tail: Oops! Well, you're not the first to have had that happen—and you're right to go to your board with it.

First, you need to be confident that your miscalculation won't happen again. The best way to do this is to review your calculations a second time (at least). In addition, make sure you've incorporated extra resources and time needs based on all recent data into your project plan—and that you've triple-checked your assumptions.

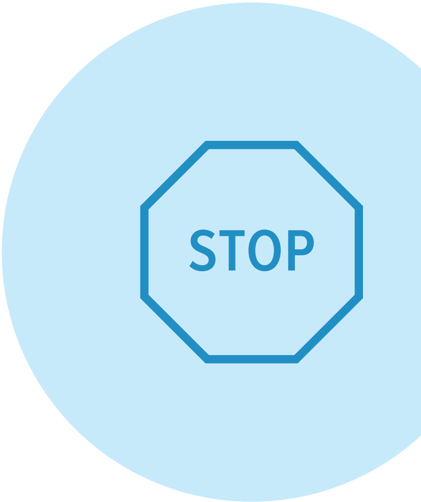
While you're doing that, let your project sponsor and board know that it's coming. No one likes surprises on projects.

When you're confident that you have a new plan complete with: detailed risk management plans in case something similar happens again; an explicit contingency buffer, and preferably an estimate expressed as a range you're ready to write it up. Then, run it by someone who doesn't know much about your project. When you're ready, present the plan honestly to your board in a meeting, preferably face-to-face. Answer questions and backup your decisions. Ask them to approve the change to the timeframe and the additional resources.

If they do, great. If they don't, you'll have to work together to come up with a suitable alternative which might be taking work out of scope, reducing quality or splitting the project into multiple phases. They might have other ideas, including canceling the project totally if the "moment" was so huge that your new plan is commercially unfeasible. Be ready for that!

It's fine to go back and ask for more because things happen on projects and situations change. Most managers will have lived through similar moments and they know that. What's not OK is going back to ask for more time week after week, month after month. That's a fast way to lose credibility.

When Work Comes To A Screeching Halt



Dear Elizabeth: I'm managing a project that has come to a screeching halt as the stakeholders argue over some new features we may or may not add. There's other work for the team to do, but not a lot. In the meantime, how do I keep my team motivated and also ready to jump back in when we get the green light? – *Sweating it out in Seattle*

Dear Sweating: Ah, the joys of working with stakeholders who are in conflict! It's common knowledge that project teams work best when they know why they're doing their work and understand how it links to a bigger picture. Work is more rewarding that way. If the stakeholders don't even know what they want then it's hard to see how your contribution is making a difference to any strategic goal.

Be honest with your team. They'll find out the real reasons for the delay anyway, so there's no sense in hiding it from them. Ask their advice about priority tasks for the meantime. Try to get involved in the conflict resolution, perhaps through designing mockups or facilitating workshops.

Let them work on other initiatives if they have time, but keep a regular project management structure where you are still meeting them regularly and updating them. Flag the resource issue to your stakeholders and point out that you can't keep the resources indefinitely. A delay in clarifying requirements could mean an even greater delay to the project when the decision is made, as at that point your team members could be off working on other things and you might not be able to get them back.

These slower workload times are great opportunities for training and professional development. Start asking: What courses could your team members do? Could they work shadow or self-study if money is tight? Try to frame this slow period as a fantastic opportunity to polish the deliverables they have already produced and line up for a running start on the next set once the decision is made. Research those new tools they've been talking about and get a head start on your 2017 strategic planning. This is your team's chance to get involved in tasks that they've not been able to work on before!

How to Manage a Micromanager

Dear Elizabeth: I'm working on a project for a new, big customer and one of our stakeholders is asking us constantly how things are going and micromanaging in a way he hasn't done before. What is the best action a project manager can take to instill confidence in stakeholders? –*Aggravated*

Dear Aggravated: In a word: communicate.

People tend to micromanage when they aren't hearing what they need to hear. The best way to resolve that is to ask your stakeholder exactly what she wants and then give it to her.

You may find that she doesn't know what she wants; she just knows that she isn't getting it yet. You might have to try several different iterations of your communications approach before you settle on one that works best for both of you.

Your situation sounds as if your stakeholder isn't the kind of person to micromanage normally, so she's probably feeling more nervous about this big project. It's really important to work in a climate of "no surprises." There's nothing that undermines confidence in your ability to manage the project and work with a stakeholder than when she turns up to a meeting and learns important information that she should have known the day before.

Make sure that your stakeholders knows what you know. If she's particularly interested in the details of this project, give her access to the schedule and the project management software so she can see updates in real time.

Check in regularly to see that she has all the information she needs.

As the project progresses, and you keep her updated, you're likely to find that she backs off; but if this doesn't happen, and you have a good working relationship, tell her that he's micromanaging and explain the problems it's causing! Together you can find ways to make sure the project is managed effectively, and help her feel confident in the work being done. You just need to communicate, and provide easy access to the plan.

> "Apply your professional judgment every day and prioritize the most important things."

Late and Over Budget—Again

Dear Elizabeth: Of all the IT projects I've worked on in the last five years, only one has come in on budget and on time. What do you see as one of the most common mistake made by project teams working on IT projects?
–*Overworked*

Dear Overworked: First, you are not alone! Many, many projects have their budget and schedule changed during their life cycles, so it is not unusual. That's often because the scope has changed, rather than because the team was incompetent (and I'll assume that's been the case for you too!).

From my experience, the most common mistake made by project teams working on IT projects is that they don't involve the end users adequately. Ideally, you should have an end user involved in the project for the life of the work. The reason behind this is that you need to make sure that what you're delivering is going to add value and be used by the people it's intended for. It's very easy to gold plate a project (in other words, to add in extra functionality that the client didn't ask for) or to interpret a requirement incorrectly. Having someone there to constantly pull you back to the core objectives and the requirements really helps.

The second most common mistake is around estimation. This might not be a mistake as such as a miss. Many IT projects have a unique element and that makes it hard to estimate accurately. Plus, organizations aren't particularly good at learning how to estimate and then applying that routinely to improve estimates in the future.

How to Be a Good Leader

Dear Elizabeth: I'm getting promoted to start managing a team next month. What do team members most respect (or need) in their project leads?
– *New Leader*

Dear Leader: Congratulations! That's fantastic news. The great thing is that you're already thinking about how to make a good impression, so that's a very positive start to your new leadership position.

Right, let's get to your question. Unfortunately, it's not an easy answer because everyone is different.

Generally, the things people respect and need from their project leads are:

- Openness
- Honesty
- Trust
- Integrity

I call these the four pillars of leadership. Be open about information that comes to you from your leaders and share what you can. Be honest with people and tell them when you can't share information or can't act on something. Trust others, and be trustworthy with their confidences. Act with integrity.

In reality, everyone on your team is a separate individual. So while these pillars form a great base to work from, talk to your team members about what they need and expect from you. Meet each one individually and ask questions around needs, expectations and how you can support them. For example, it might be important for one person to meet with you regularly. Another team member might have certain expectations around reporting, or specific processes needed to complete their work. There might be occasional personal circumstances that one team member might ask for around, say, parental responsibilities.

So, two approaches: Talk to your team individually and set expectations that work for each person, and then set boundaries and ground rules for the team as a whole. And make sure you include the expectation to have some fun!

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