



BUILDING PROJECT RELATIONSHIPS

Course Material

The ability to create and maintain relationships is perhaps one of the most overlooked skills of the project manager. The project manager typically does not have positional power or supervisory authority. Therefore, it is of the utmost importance to be able to develop good working relationships with all stakeholders whether they are current or future. You never know when you will need that relationship you built one year ago.

The course is designed for project managers, line/functional managers, program managers, or business associates who lead project efforts within their organizations.

The goal of this course is to equip the project manager with the necessary knowledge, skills, and techniques to effectively manage the relationships that will lead to the completion of a successful project.

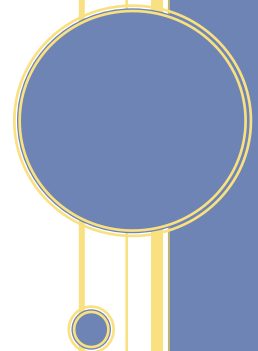


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Course Agenda

Day 1	Day2
8:30 – 9:00 Personal Introductions	8:30 - 9:00 Review
9:00 - 10:00 Foundations of Relationship Bldg	9:00 - 10:00 Problem Solving – Conflict Mgmt
10:00 - 10:15 BREAK	10:00 - 10:15 BREAK
10:15 - 11:15 Foundations of Relationship Bldg	10:15 - 11:45 Communication Issues
11:15 - 12:15 LUNCH	11:45 - 12:45 LUNCH
12:15 - 2:15 Understanding Stakeholder Needs	12:45 - 1:45 Communication Issues
2:15 - 2:30 BREAK	1:45 - 2:30 Team Relationships
2:30 - 4:00 Problem Solving – Conflict Mgmt	2:30 - 2:45 BREAK
	2:45 - 3:30 Team Relationships
	3:30 - 4:00 Exam and Evaluation

LESSON 1: FOUNDATIONAL CONCEPTS OF RELATIONSHIP BUILDING

Topic 1: Paradigms

Topic 2: Role of the Project Manager

Topic 3: Importance of Relationship Skills

Topic 4: Multiple Perspectives

Topic 5: PM Roles and the Client

Topic 6: Identifying Key Issues

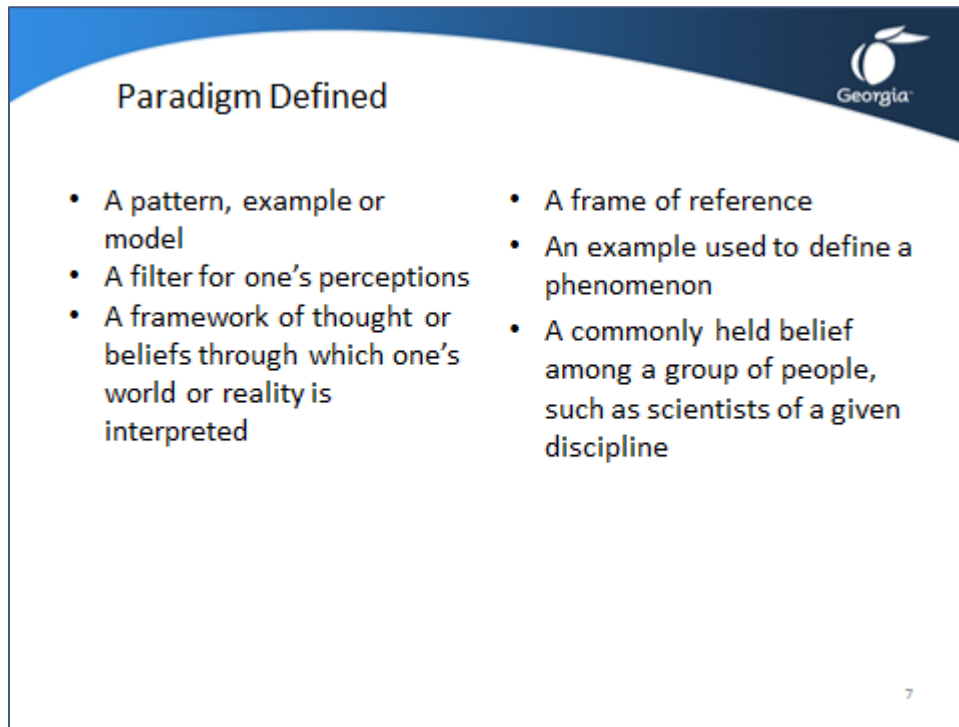
Student Learning Objectives

After completing this lesson you should be able to

- Understand the different roles of the project manager
- Understand the issues that the various roles entail
- Understand the impact that relationship skills have on the project manager

Approximate Presentation time: 2 hours

Topic 1: Paradigms



Paradigm Defined

- A pattern, example or model
- A filter for one's perceptions
- A framework of thought or beliefs through which one's world or reality is interpreted
- A frame of reference
- An example used to define a phenomenon
- A commonly held belief among a group of people, such as scientists of a given discipline

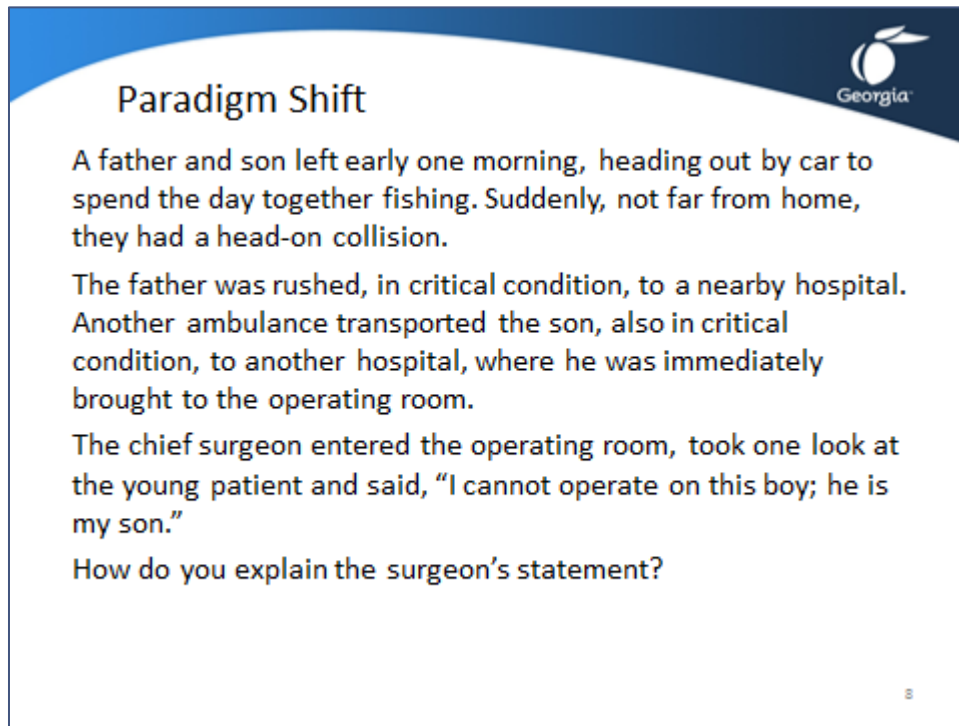
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What is a Paradigm? Thomas Kuhn, in his book [The Structure of Scientific Revolutions](#), described a paradigm as a “series of peaceful interludes punctuated by intellectually violent revolutions”, and in those revolutions “one conceptual world view is replaced by another”.

Think of a paradigm shift as a change from one way of thinking to another. It's a revolution and a transformation. It is driven by agents of change.

Agents of change helped create a paradigm shift from the Ptolemaic system (the earth is at the center of the universe) to the Copernican system (the sun at the center of the universe). This movement eventually changed the world view.

Topic 1: Paradigms ...continued



Paradigm Shift

A father and son left early one morning, heading out by car to spend the day together fishing. Suddenly, not far from home, they had a head-on collision.

The father was rushed, in critical condition, to a nearby hospital. Another ambulance transported the son, also in critical condition, to another hospital, where he was immediately brought to the operating room.

The chief surgeon entered the operating room, took one look at the young patient and said, "I cannot operate on this boy; he is my son."

How do you explain the surgeon's statement?

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Paradigms help shape the world around us.

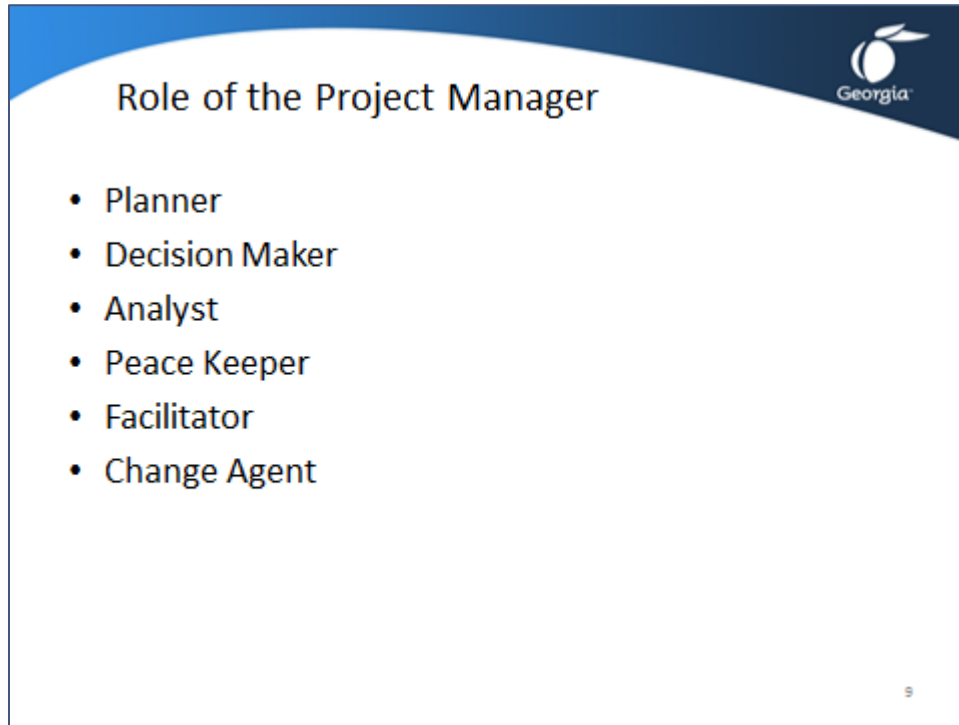
Since a paradigm is a set of theories and value used to interpret what we see and experience, paradigms can act as a constraint on our ability to be able to change perspectives and see things from another point of view.

During project planning, execution and transition, project managers must facilitate changing paradigms within the organization as well as for individual stakeholders.

Organizational change may be experienced as a "series of peaceful interludes punctuated by intellectually violent revolutions". This is similar to how change is often experienced in the scientific realm. The role of the project manager is to facilitate the change process as peacefully as possible.

The riddle above may challenge our traditional paradigm of family relationships. To understand it requires a shift in thinking.

Topic 2: Role of the Project Manager



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Role of the Project Manager

- Planner
- Decision Maker
- Analyst
- Peace Keeper
- Facilitator
- Change Agent

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As a project manager, these are some of the roles you have to play to get your job done.

As you can see, the list above is incomplete. With the people around you:

- Discuss the additional roles project managers must fulfill.
- Brainstorm a list of additional roles, and write them below
- Be prepared to share your list with the class.

Topic 2: Role of the Project Manager – Another View



This is another way to think of the roles of the project manager.

Additional roles have been added to our list. Keep in mind that the terms used to identify the roles may be different from the ones generated during the brainstorming.

When you are interacting in these various roles, communication is invariably two-way.

Topic 2: Role of the Project Manager – Another View

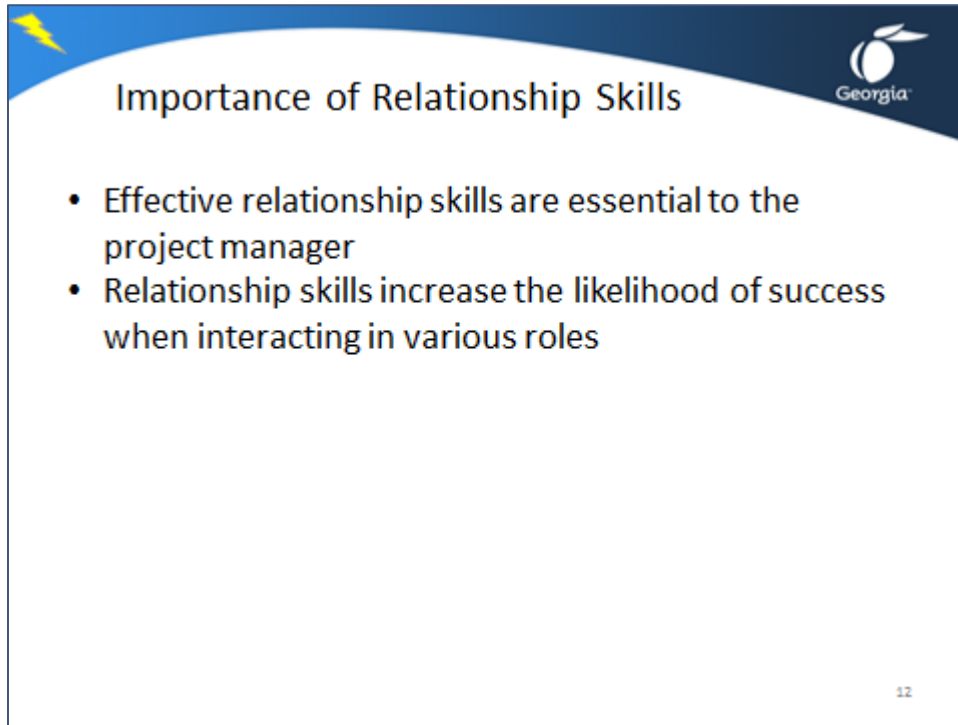


Two-way interaction always involves working through people, either individually or with teams.

To successfully function as a project manager, you must achieve results while interacting with others at different points in time.

The project manager playing the role of subject matter expert takes time away from the ability of the PM to build relationships and allows the team to disengage from the project work.

Topic 3: Importance of Relationship Skills



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Importance of Relationship Skills

- Effective relationship skills are essential to the project manager
- Relationship skills increase the likelihood of success when interacting in various roles

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Achieving results in the various roles of the project manager partially depends on personal technical expertise. However, a large portion of success depends upon your ability to work with others in various roles. Knowing when and how to use each set of personal relationship skills will significantly increase your chances of being successful.

Topic 3: What Key Relationships Exist on Your Projects?

What Key Relationships Exist on Your Projects?

Relationships

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Challenges

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

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Reflection and Discussion Point

What, in your opinion, are the key relationships on the projects you manage? Often, these relationships will be based upon your work environment. Do you work primarily on projects for outside customers under contract? Do you work primarily on internal process improvement, product development, I.T., or regulatory compliance types of projects?

Now that you have listed your key relationships, what makes these relationships challenging?

Exercise 1.1: Identify Key Relationships and Their Challenges

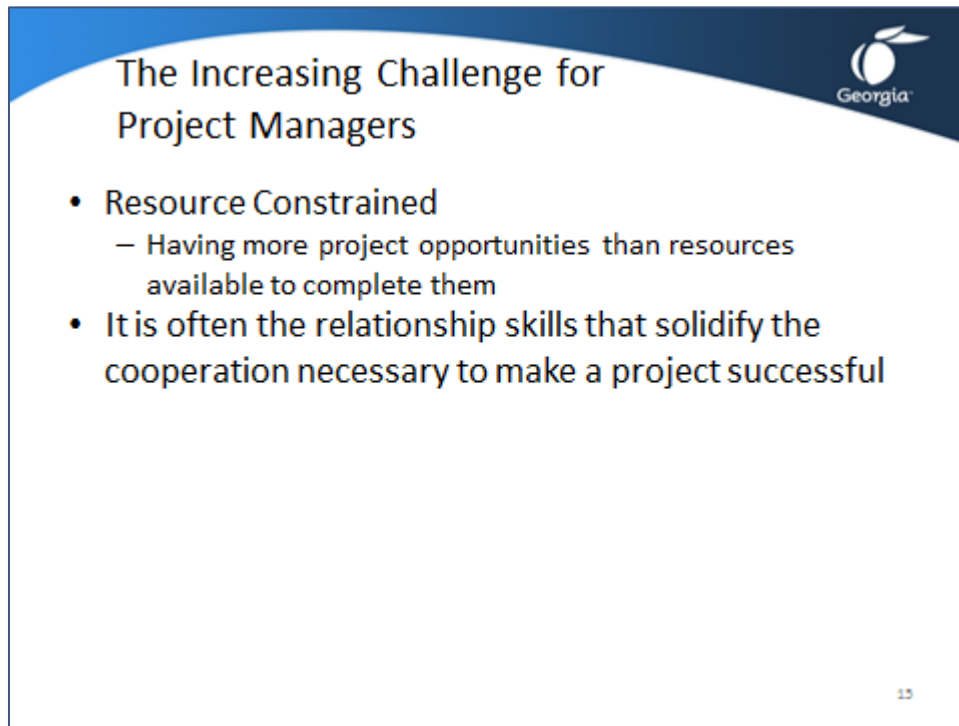
Instructions:

Review the case study and be prepared to discuss the following items.

1. What are the key relationships that will need to be managed on the On-line Order Entry project?

2. Discuss why these relationships may be challenging.

Topic 3: The Increasing Challenge for Project Mangers



The Increasing Challenge for Project Managers

- Resource Constrained
 - Having more project opportunities than resources available to complete them
- It is often the relationship skills that solidify the cooperation necessary to make a project successful

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Most organizations are in a resource-challenged environment. Projects abound and the project manager is constantly fighting for attention, priority and results.

Even today, with the recognition brought to the profession of project management by PMI®, most projects do not finish on time, on budget or within scope, according to the latest survey of the Standish Group.

Therefore, no matter how outstanding the technical skills of the project manager, it is often the relationship skills that solidify the cooperation necessary to make a project successful. It is the responsibility of the project manager to keep in mind the goals of the organization, and to interact constructively and non-defensively with professionals from other disciplines.

Topic 3: Critical Relationship Factors



Critical Relationship Factors

- **Critical Factors:**
 - Mutually understood common objectives
 - Mutual respect
 - Accountability to clearly understood metrics
 - Authority aligned with responsibility
 - Clear boundary definitions
- **What leads relationships astray?**

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Objectives should be clearly understood by all parties to ensure that everyone is aligned and working towards the same goal.


Effective relationships are based on mutual respect for each other. Treat each other professionally. Mutual respect does not have to include friendship. You don't need to like someone to treat them with respect.

People need to be clear about what is expected of them and how their efforts will be evaluated. If a person is responsible for something, it is important that they have the support and authority to complete the task.

Clearly defining boundaries prevents the "stepping on other people's toes" syndrome. This situation is damaging to relationships, especially with teams.


Topic 4: Multiple Perspectives

Multiple Perspectives



The Blind Men and the Elephant

- The poem describes conflict
- Think about how the arguments came about
- Is there a parallel between the poem and your work environment?



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As you listen to the poem, think about the relationship that exists between the blind men of Indostan.

Think about what is happening when each has their separate interaction with the animal. How does this affect their view of the creature?

Does a paradigm shift occur?

Look at the critical relationship factors on the previous page and see which of the factors were in place and which were not.

The Blind Men and the Elephant

A Poem by John Godfrey Saxe (1816-1887), based upon an ancient Hindu parable.

It was six men of Indostan
To learning much inclined,
Who went to see the Elephant
(Though all of them were blind),
That each by observation
Might satisfy his mind.

The *First* approached the Elephant,
And happening to fall
Against his broad and sturdy side,
At once began to bawl:
"God bless me! but the Elephant
Is very like a WALL!"

The *Second*, feeling of the tusk,
Cried, "Ho, what have we here,
So very round and smooth and sharp?
To me 'tis mighty clear
This wonder of an Elephant
Is very like a SPEAR!"

The *Third* approached the animal,
And happening to take
The squirming trunk within his hands,
Thus boldly up and spake:
"I see," quoth he, "the Elephant
Is very like a SNAKE!"


The *Fourth* reached out an eager hand,
And felt about the knee
"What most this wondrous beast is like
Is mighty plain," quoth he:
"'Tis clear enough the Elephant
Is very like a TREE!"

The *Fifth*, who chanced to touch the ear,
Said: "E'en the blindest man
Can tell what this resembles most;
Deny the fact who can,
This marvel of an Elephant
Is very like a FAN!"

The *Sixth* no sooner had begun
About the beast to grope,
Than seizing on the swinging tail
That fell within his scope,
"I see," quoth he, "the Elephant
Is very like a ROPE!"

And so these men of Indostan

Disputed loud and long,
Each in his own opinion
Exceeding stiff and strong,
Though each was partly in the right,
And all were in the wrong!



Multiple Perspectives

Later a wise man rendered this meaning to the parable of the Blind Men and the Elephant:

“When we cling and wrangle about our view, we become as blind and unseeing as these men from Indostan... in their ignorance they are by nature quarrelsome, wrangling, and disputatious, each maintaining reality is thus and thus. Such folk see only one side of a thing.”

Doctrine of Anekanta, the mansidedness of things. Cf. Tattvarthasloavatika 116, p. 806. Mihir Yast 10.2: Cf. Analects 15.5, p. 1020.

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Exercise 1.2: Multiple Perspectives – The Blind Men and the Elephant

Instructions:

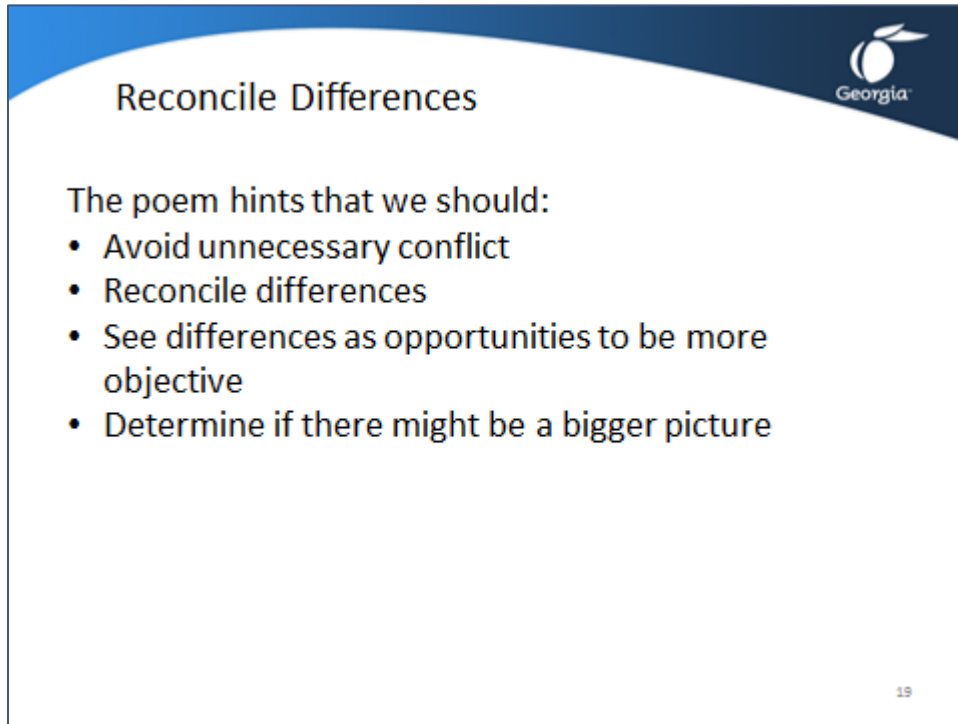
Review the poem “The Blind Men and the Elephant” and be prepared to discuss the following items.

- Why do the blind men reach the conclusions they do?
- Is each blind man logical?
- Why don't the blind men look further for the whole truth?
- Describe a time when you jumped to a conclusion about something and later found out you only had part of the story or truth.
- What does the poem teach us about relationships?

Think about the questions above and how they relate to the concepts of:

- Paradigm shift
- Critical relationship factors
- Fixed paradigms as a limiting factor

Topic 4: Reconcile Differences



Reconcile Differences

The poem hints that we should:

- Avoid unnecessary conflict
- Reconcile differences
- See differences as opportunities to be more objective
- Determine if there might be a bigger picture

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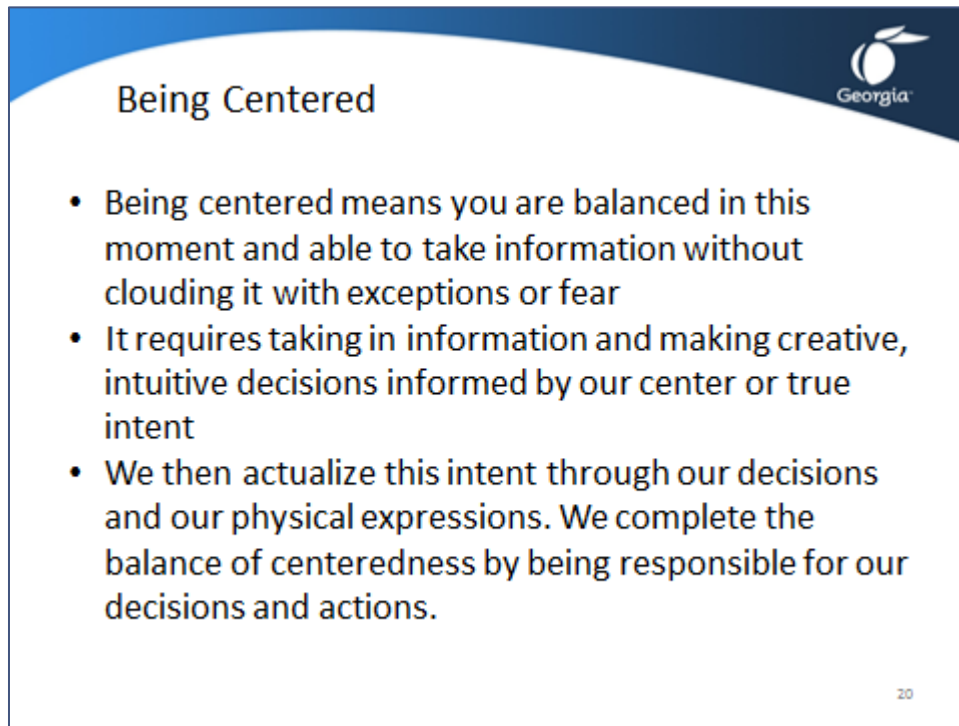
The six blind men faced unnecessary conflict, because each was convinced of his paradigm and unwilling to reconcile differences.

Each man was convinced they were right because they knew their story was truthful. Discovering that the truth was actually stated in six different ways teaches us to be tolerant towards the viewpoints of others.

Although each identified the elephant in his own way, the conclusion could not be shared with each other in a meaningful way.

Stop and examine your perspective and paradigm. You may need to make a shift. Being able to evaluate your point of view objectively and change it, if necessary, is part of being centered.

Topic 4: Reconcile Differences – Being Centered



Being Centered


- Being centered means you are balanced in this moment and able to take information without clouding it with exceptions or fear
- It requires taking in information and making creative, intuitive decisions informed by our center or true intent
- We then actualize this intent through our decisions and our physical expressions. We complete the balance of centeredness by being responsible for our decisions and actions.

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At the best of times, it is not difficult to maintain our center; it is more difficult to remain centered when difficult things are happening.

Being centered is a physical state concerning center of gravity, natural posture and movement as well as a state of mind made up of our philosophy, and values. The human system is always searching for and trying to maintain balance.

Topic 5: PM Roles and the Client



PM Roles and the Client

	Your First Thought	How would your boss answer?	How would your clients answer?
Consultant			
Technical Advisor			
Negotiator			
Bureaucrat			
Manager			
Facilitator			
Service Provider			

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We have already discussed many different roles played by a project manager.

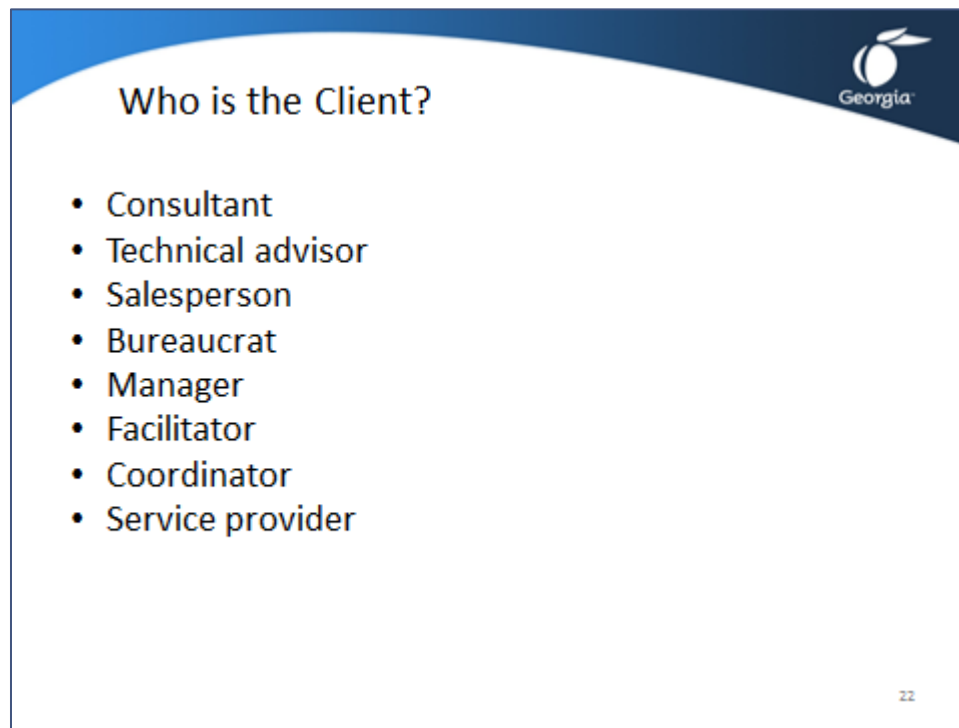
On the grid below, take the opportunity to think about how:

- You view your role
- Your boss views it
- Your clients might view it

Clearly understanding the different perspectives of our role helps guide our relationships and interactions.

	Your First Thought	How would your boss answer?	How would your clients answer?
Consultant			
Technical Advisor			
Negotiator			
Bureaucrat			
Manager			
Facilitator			
Service Provider			

Topic 5: Who is the Client?



Who is the Client?

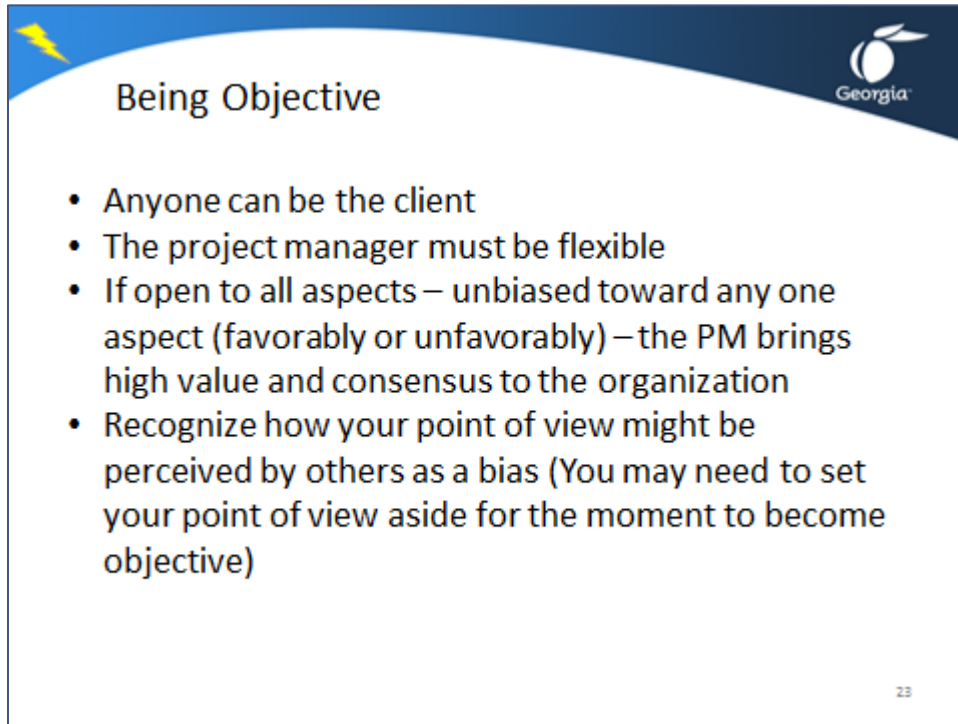
- Consultant
- Technical advisor
- Salesperson
- Bureaucrat
- Manager
- Facilitator
- Coordinator
- Service provider

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A project manager's client could be anyone. He could be filling one of the same roles that the project manager finds him/herself fulfilling.

Topic 5: Being Objective



Being Objective

- Anyone can be the client
- The project manager must be flexible
- If open to all aspects – unbiased toward any one aspect (favorably or unfavorably) – the PM brings high value and consensus to the organization
- Recognize how your point of view might be perceived by others as a bias (You may need to set your point of view aside for the moment to become objective)

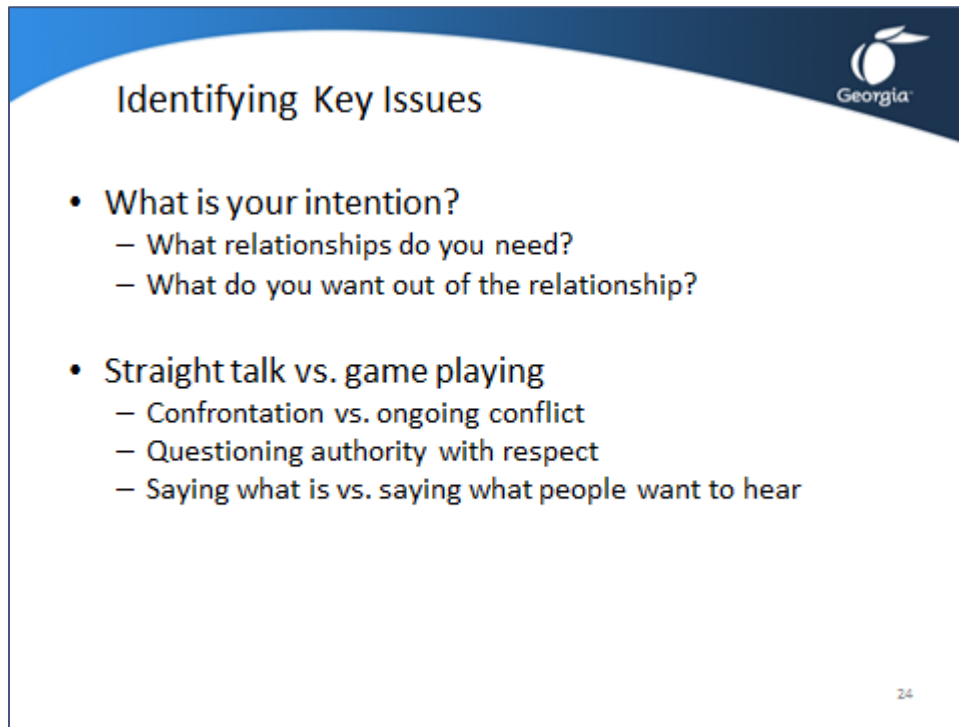
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A project manager must be able to play many parts and adapt to the many roles fulfilled by the client.

If the project manager is open and not biased to any one aspect, the project manager can bring high value and consensus building skills to the client and the client's organization.

Being centered means recognizing your personal bias, and conscientiously putting it aside so you can be objective in your interactions. It is also having the ability to separate emotion from fact when decision making or problem solving is called for.

Topic 6: Identifying Key Issues



Identifying Key Issues

- **What is your intention?**
 - What relationships do you need?
 - What do you want out of the relationship?
- **Straight talk vs. game playing**
 - Confrontation vs. ongoing conflict
 - Questioning authority with respect
 - Saying what is vs. saying what people want to hear

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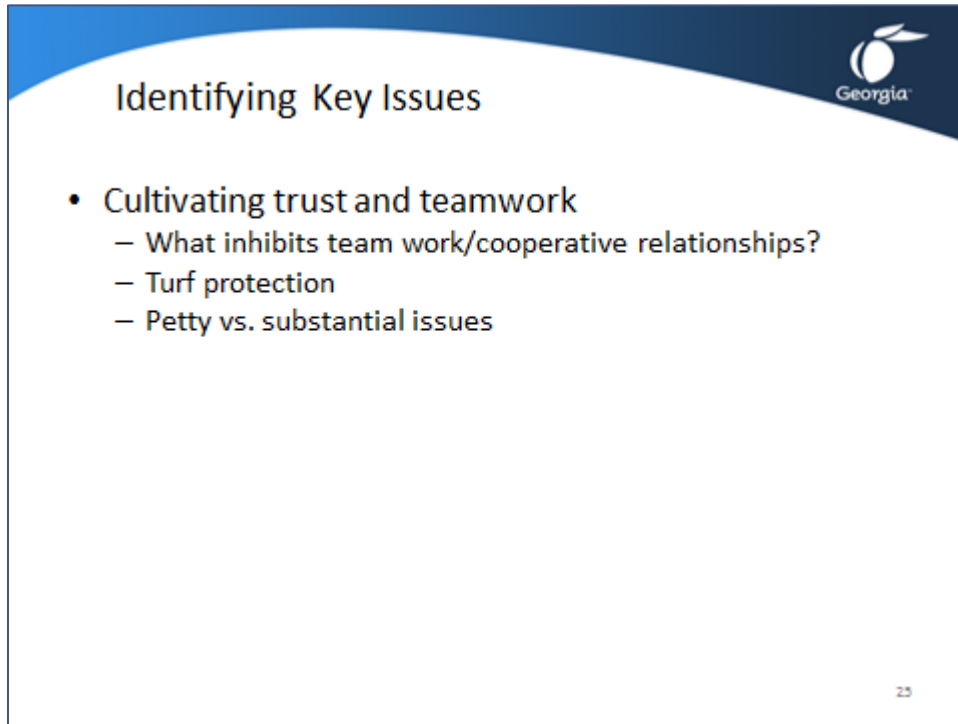
Knowing and understanding the underlying issues driving a relationship is integral to successfully managing that relationship.

Clearly understanding your intent will guide your understanding of the relationships you should form and cultivate as a project manager.

Your intent will also help you understand your anticipated outcomes or demands.

Sometimes people hide their true intent by game playing, (saying one thing but meaning another), or looking for a different outcome. Engaging in straight (honest) talk can help avoid or avert the derailing impact of game playing.

Topic 6: Identifying Key Issues



Identifying Key Issues

- **Cultivating trust and teamwork**
 - What inhibits team work/cooperative relationships?
 - Turf protection
 - Petty vs. substantial issues

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In today's multi-tasked work environment, not much is achieved by one person's isolated and individual efforts.

The synergy of team work is necessary to get everything done. Trust and team work does not happen by accident, it usually has to be nurtured and developed.

As a project manager, being centered will keep you alert to turf protection and petty rifts which hamper a team's effectiveness.

Lesson 1 Summary: Learning Objectives Recap

- **Understand the different roles of the project manager**

Planner, Decision Maker, Analyst, Peace Keeper, Facilitator, Change Agent

- **Understand the issues that the various roles entail**

Clearly understanding your intent will guide your understanding of the relationships you should form and cultivate as a project manager.

Sometimes people hide their true intent by game playing, (saying one thing but meaning another), or looking for a different outcome.

The synergy of team work is necessary to get everything done. Trust and team work does not happen by accident, it usually has to be nurtured and developed.

- **Understand the impact that relationship skills have on the project manager**

A large portion of success depends upon your ability to work with others in various roles. Knowing when and how to use each set of personal relationship skills will significantly increase your chances of being successful.

LESSON 2: UNDERSTANDING STAKEHOLDER NEEDS

Topic 1: Defining the Stakeholder

Topic 2: Stakeholder Needs

Topic 3: Managing and Measuring Stakeholders

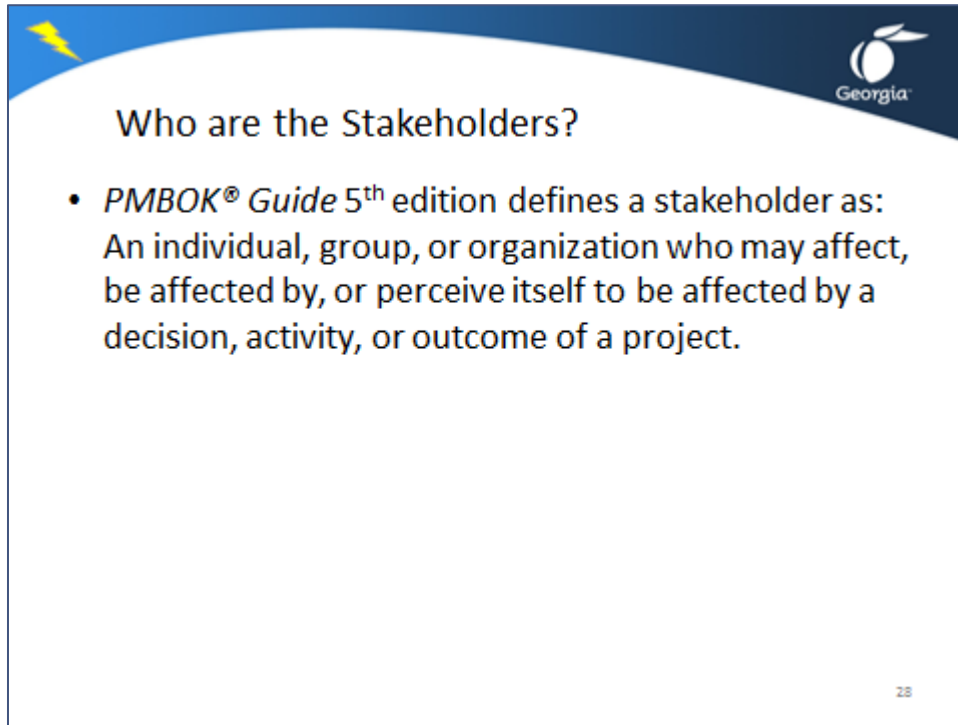
Student Learning Objectives

After completing this lesson you should be able to

- Understand the various stakeholder roles
- Understand the influence factors in stakeholder decision-making authority
- Understand how to gain a common understanding and agreement for training and quality performance

Approximate Presentation time: 2 hours

Topic 1: Defining the Stakeholder



Who are the Stakeholders?

- *PMBOK® Guide* 5th edition defines a stakeholder as:
An individual, group, or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.

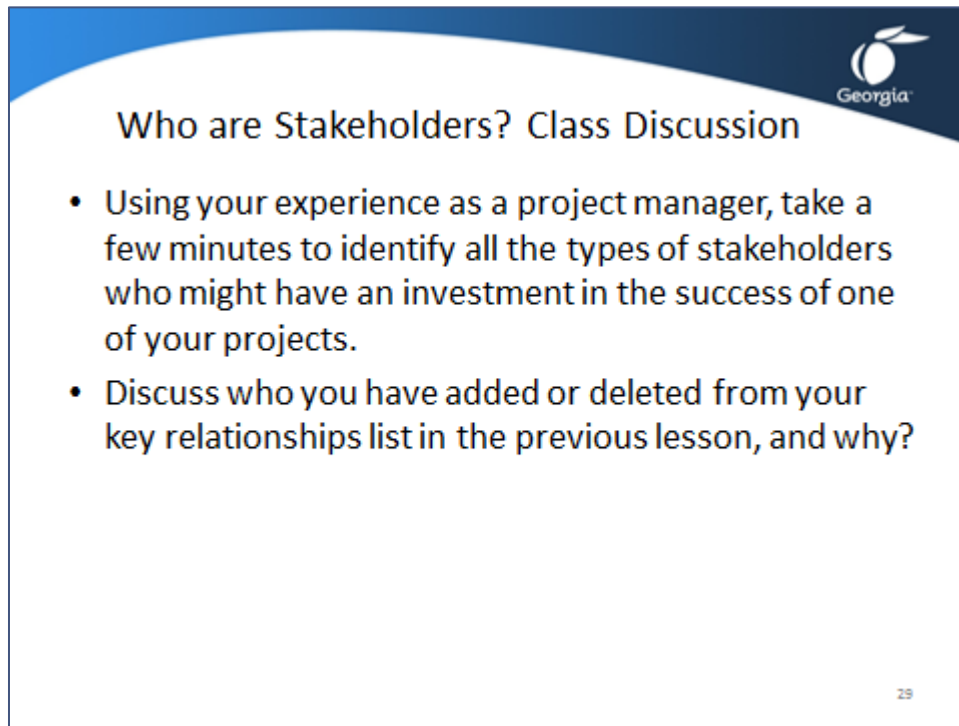
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Stakeholders have a personal or professional interest in a project or business venture. A stakeholder stands to gain or lose depending on the outcome of the matter at hand.

Depending on how high the stakes are, a stakeholder will respond both on an intellectual and emotional level to his/her perception of the risk factors involved in a project.

Tolerance to risk varies from individual to individual. This has a direct correlation to the way an individual will make decisions, give commitments and exercise authority.

Topic 1: Defining the Stakeholder



Who are Stakeholders? Class Discussion

- Using your experience as a project manager, take a few minutes to identify all the types of stakeholders who might have an investment in the success of one of your projects.
- Discuss who you have added or deleted from your key relationships list in the previous lesson, and why?

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Class Discussion:

Using your experience as a project manager, take a few minutes to identify all the types of stakeholders who might have an investment in the success of one of your projects.

Discuss who you have added or deleted from your key relationships list in the previous lesson, and why?

Exercise 2.1: Stakeholder Decisions and Influence

Instructions:


In your small group, look at the list of stakeholders identified during the class discussion and answer the two questions below about each stakeholder role:

1. What decisions would each stakeholder make?
2. What influence should each stakeholder have?

Complete the table below for each of the stakeholder roles you discuss.

Stakeholder	Decisions (they make)	Influence (they have)

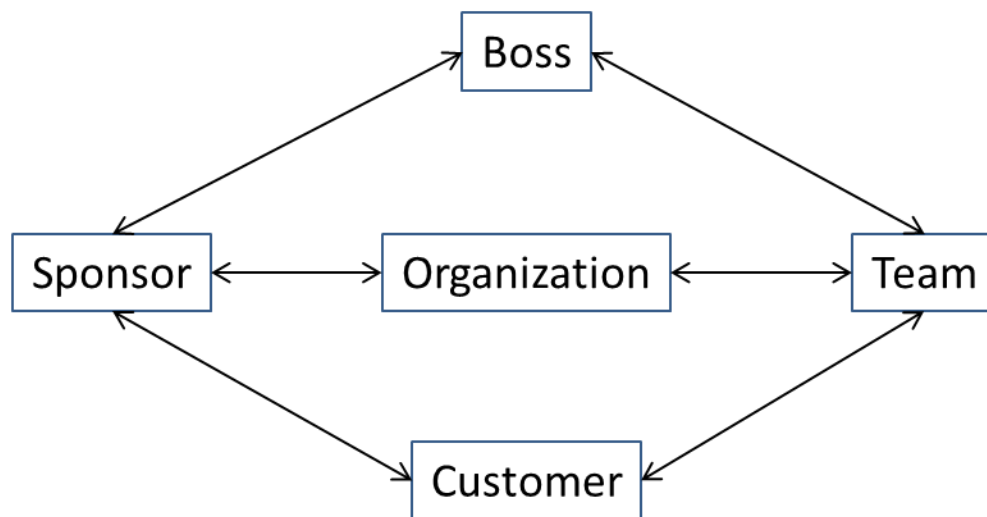
Topic 2: Stakeholder Needs



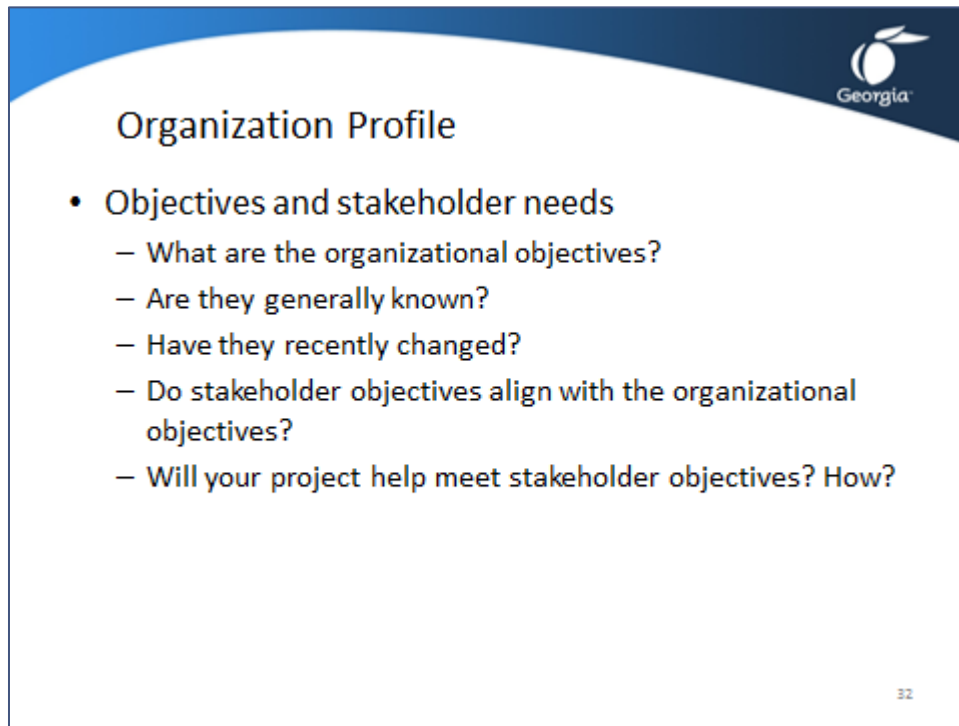
Stakeholder Needs

- Which client should we put our priority on serving?
- What is our objective?
 - For the project?
 - For the organization?

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Topic 2: Organizational Profile



Organization Profile

- Objectives and stakeholder needs
 - What are the organizational objectives?
 - Are they generally known?
 - Have they recently changed?
 - Do stakeholder objectives align with the organizational objectives?
 - Will your project help meet stakeholder objectives? How?

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Constructing an organizational profile is especially helpful for internal projects. The questions below will help you profile the key people involved in the project and understand the stakeholder's needs.

Organization Profile

Key People

(users, sponsors, clients and other)

- Who do they work for?
- Where are they in the organization?
- What do they do?
- Are they for, against, or neutral? Why?
 - How will they be affected by your product/service?
 - How do they think they will be affected?
 - How important are they? Why?
- What are their objectives/what motivates them?
- What is their thinking style?
- What is their communication (social) style?
- How do they respond to change?
- Are they available to you?
 - How often?
 - For how long?
 - Via what media?

Exercise 2.2: RAM Role Play

Instructions:

Using our class case study, consider the new order entry system. Customers will be able to order products through the company web site.

In previous projects, there were delays and constant fights over decisions.

To overcome this problem, the company will be using the responsibility assignment matrix (RAM) technique.

Complete this RAM, putting yourself in the role of the end user (manager of order entry)

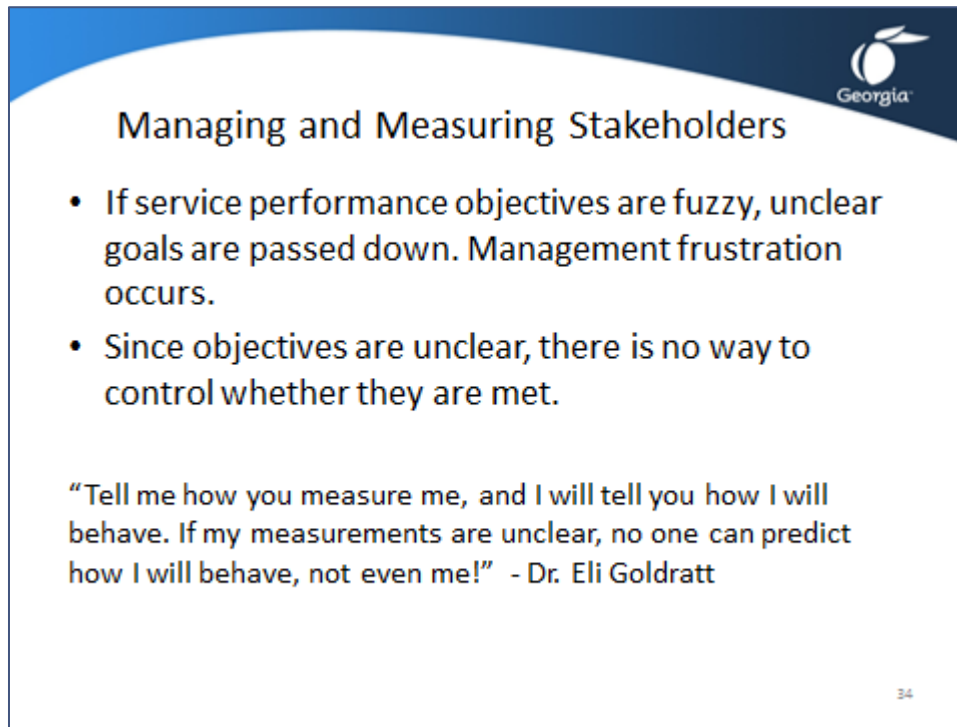
Task	IT Mgr	Mgr Ord Entry	Customer Pilot Team	Ord Entry Pilot Team	CIO	VP Operations
Choose software package						
Customer Interface Design						
Define computer backup process						

Complete this RAM, putting yourself in the role of the IT Manager

Task	IT Mgr	Mgr Ord Entry	Customer Pilot Team	Ord Entry Pilot Team	CIO	VP Operations
Choose software package						
Customer Interface Design						
Define computer backup process						

Codes: S – Sign off required, I – Input required, R – Review required, P – Participant, A – Accountable
O – Can Override

Topic 3: Managing and Measuring Stakeholders



Managing and Measuring Stakeholders

- If service performance objectives are fuzzy, unclear goals are passed down. Management frustration occurs.
- Since objectives are unclear, there is no way to control whether they are met.

“Tell me how you measure me, and I will tell you how I will behave. If my measurements are unclear, no one can predict how I will behave, not even me!” - Dr. Eli Goldratt

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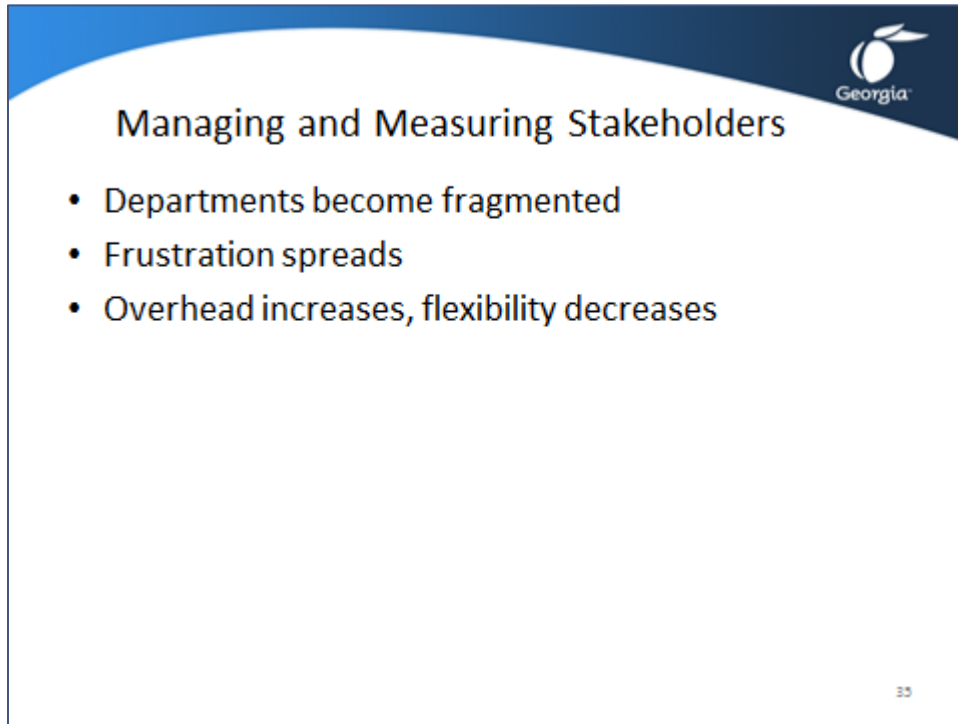
Managing and measuring performance is built upon the foundation of clearly identified and measurable results.

If you set out on a journey with no clear idea of the destination, route to be taken or stop off points, how will you know how well you are doing?

Measurements can be in terms of:

- Quality (type of errors, rework, or complaints)
- Quantity (amount of tasks completed)
- Time (meeting deadlines)
- Cost (managing budgets)

Topic 3: Managing and Measuring Stakeholders



Managing and Measuring Stakeholders

- Departments become fragmented
- Frustration spreads
- Overhead increases, flexibility decreases

35

When performance objectives or measurable goals are unclear, not understood, or not communicated effectively, departments and teams lose the “glue” that binds their work together.

Departments find their own direction and end up going their own way. Frustration spreads, and politics become a predominant activity. Productivity suffers. Overhead increases, flexibility decreases, performance degrades and lethargy sets in.

Topic 3: Setting Clear Goals and Objectives

Setting Clear Goals and Objectives

- An effective method for ensuring alignment begins with goals that:
 - Are important to the audience
 - Are in some manner influenced by the phenomenon that is to be measured
- From goals, a set of questions is derived that the target audience would need answered to assess goal progress
- Metrics define requirements for the information needed to answer the questions
- Measurement data enables questions to be answered ... and thereby goal progress to be assessed

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Goal, Question, Metric* Approach

Metrics are of no value unless aligned with that which matters to their intended audience

1. An effective method for ensuring alignment begins with goals that:
 - a. Are important to the audience
 - b. Are in some manner influenced by the phenomenon that is to be measured
2. From goals, a set of questions is derived that the target audience would need answered to assess goal progress
3. Metrics define requirements for the information needed to answer the questions
4. Measurement data enables questions to be answered ... and thereby goal progress to be assessed

* “Goal-Question-Metric Paradigm” Basili & Rombach: IEEE Transactions on Software Engineering, 1988.

Exercise 2.3: Clarifying Objectives

Instructions:

This exercise will be conducted as a class discussion.

1. Customers for the new on-line order entry system have proposed the following objective.
“Products that have been ordered should be delivered on time”.
2. How can this objective be written to give more clarity?

3. What questions could be asked to assess the objectives progress?

4. What information is needed to answer the questions above?

5. What data will need to be retrieved to answer the questions above?

Lesson 2 Summary: Learning Objectives Recap

- **Understand the various stakeholder roles**

An individual, group, or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.

- **Understand the influence factors in stakeholder decision-making authority**

Depending on how high the stakes are, a stakeholder will respond both on an intellectual and emotional level to his/her perception of the risk factors involved in a project.

Tolerance to risk varies from individual to individual. This has a direct correlation to the way an individual will make decisions, give commitments and exercise authority.

- **Understand how to gain a common understanding and agreement for training and quality performance**

Goal, Question, Metric* Approach

Metrics are of no value unless aligned with that which matters to their intended audience

1. An effective method for ensuring alignment begins with goals that:
 - a. Are important to the audience
 - b. Are in some manner influenced by the phenomenon that is to be measured
2. From goals, a set of questions is derived that the target audience would need answered to assess goal progress
3. Metrics define requirements for the information needed to answer the questions
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Notes

LESSON 3: PROBLEM SOLVING – CONFLICT MANAGEMENT

Topic 1: Decision Making

Topic 2: Conflicts in Decision Making

Topic 3: Exploring Solutions

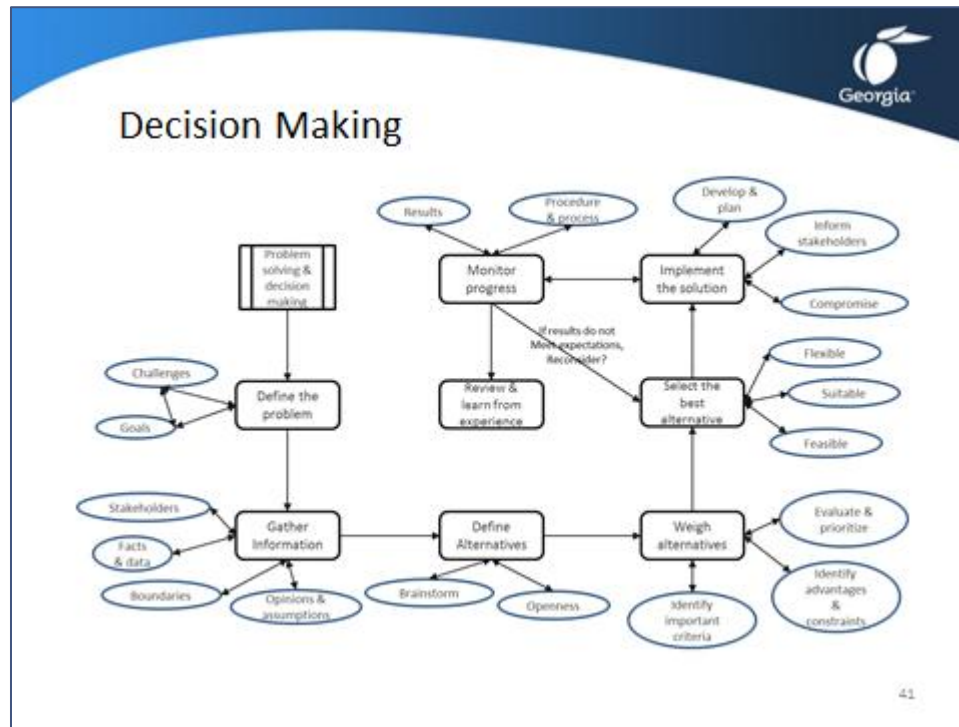
Student Learning Objectives

After completing this lesson you should be able to

- Understand the decision making process
- Understand how to use a strawman approach to reach consensus
- Understand how to use a conflict diagram

Approximate Presentation time: 2 hours 30 minutes

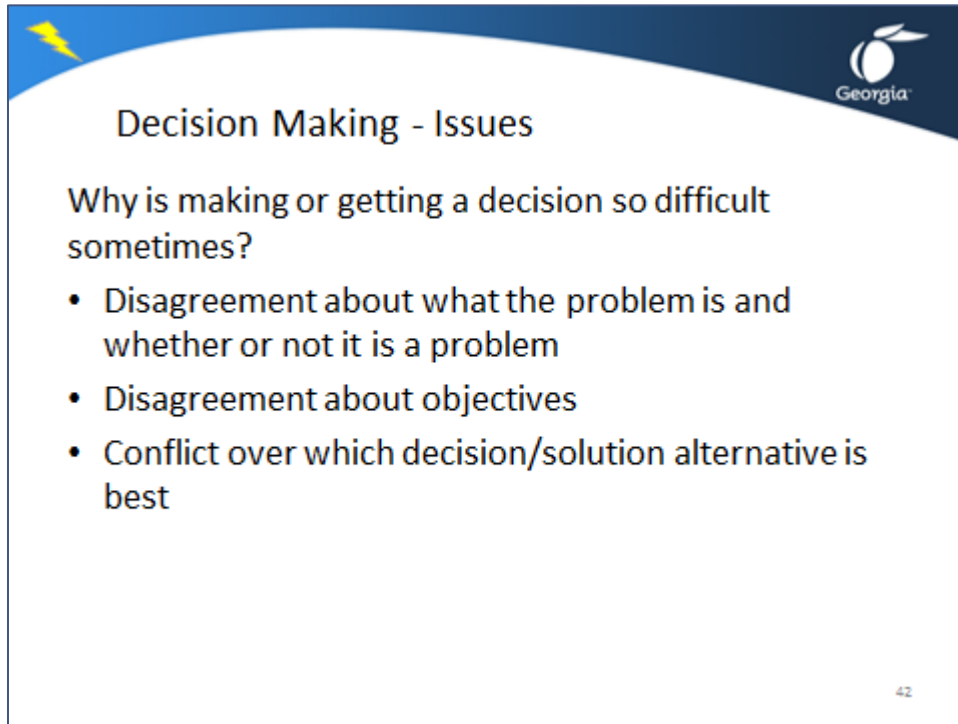
Topic 1: Decision Making



Problem solving and decision making are virtually identical. They are critical because they are the generic process that underlies planning, setting priorities, defining requirements, designing, addressing issues, and deciding whether to make a change or postpone it.

A participative, consensus-based approach involves the people who will implement and work with the solution. As a rule, imposed solutions are ineffective, because people will go out of their way to prove that the solutions won't work. Participants in a consensus process own the solution. They are motivated to make it work.

Topic 1: Decision Making - Issues



Decision Making - Issues

Why is making or getting a decision so difficult sometimes?

- Disagreement about what the problem is and whether or not it is a problem
- Disagreement about objectives
- Conflict over which decision/solution alternative is best

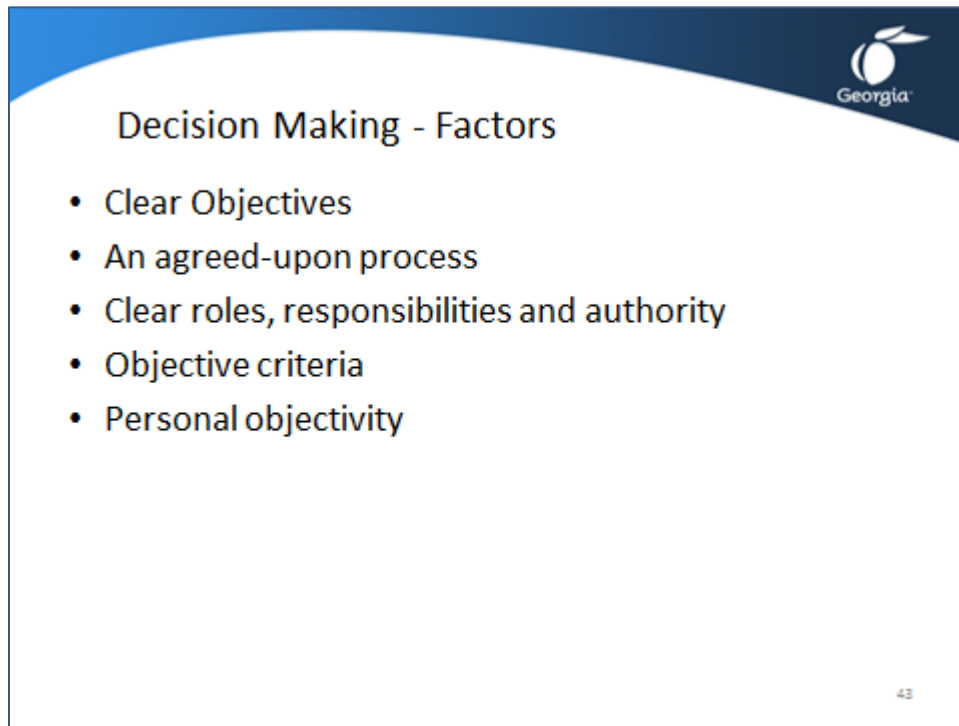
42

When individuals are conflicted, or unsure of the problem or setting, reaching a decision to address the situation is difficult.

There are many right answers to most problems. Getting to one that satisfies the need and the people involved is often difficult, because people like their solution or decision.

Often, there is no consensus about the objectives of the problem solving. How are you going to get there, if you don't know where you are going?

Topic 1: Decision Making - Factors



Decision Making - Factors

- Clear Objectives
- An agreed-upon process
- Clear roles, responsibilities and authority
- Objective criteria
- Personal objectivity

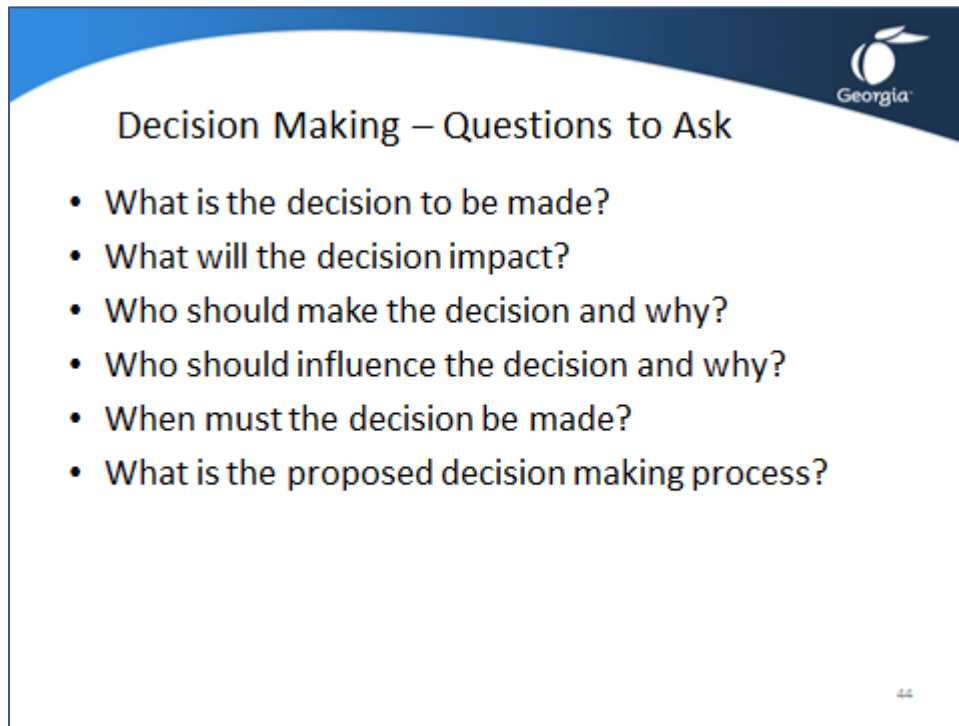
43

Your role is to be a coach and consultant to the decision makers, especially when they are indecisive.

Know who has the authority to make decisions.

Set parameters for when the decision will be made.

Topic 1: Decision Making – Questions to Ask



Decision Making – Questions to Ask

- What is the decision to be made?
- What will the decision impact?
- Who should make the decision and why?
- Who should influence the decision and why?
- When must the decision be made?
- What is the proposed decision making process?

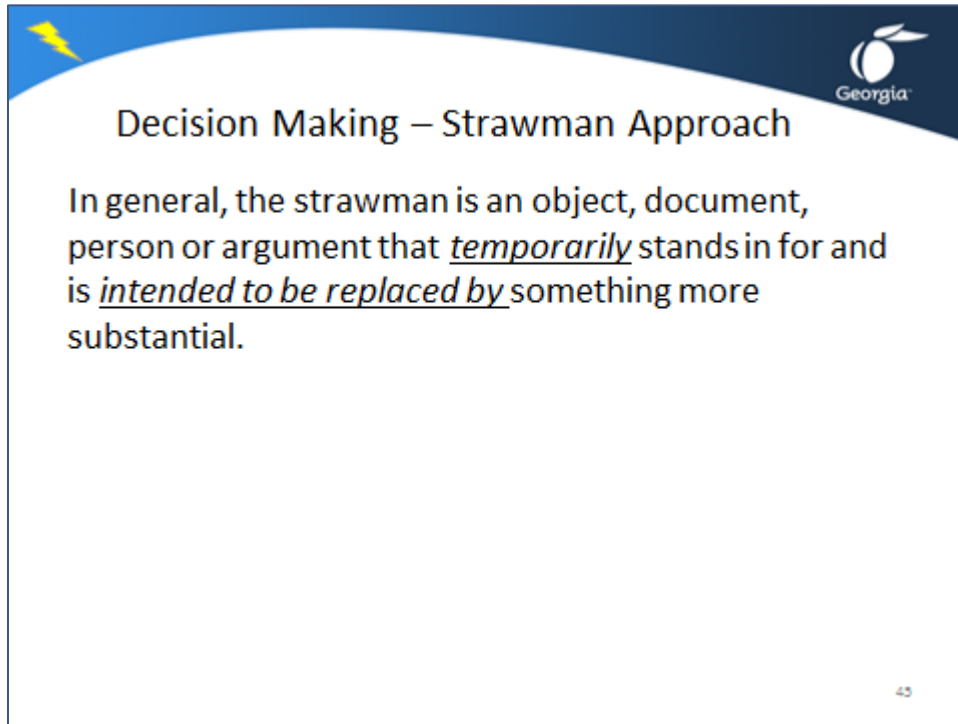
44

Answering these questions will make sure you are off to the right start in resolving issues and making decisions. The goal is to reach consensus on decisions while avoiding unnecessary conflict and maintaining good relationships.

What will this decision impact, and where will it have an impact? Evaluate the constraints and resources likely to be effected (i.e. cost, scope, time, revenues).

A strawman approach provides a balanced view of options when the choices seem unclear. Let's look at that tool.

Topic 1: Decision Making – Strawman Approach



Decision Making – Strawman Approach

In general, the strawman is an object, document, person or argument that *temporarily* stands in for and is *intended to be replaced by* something more substantial.

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In software development, a crude plan or document may serve as the strawman or starting point in the evolution of a project. The strawman is not expected to be the last word; it is refined until a final model or document is obtained that resolves all issues concerning the scope and nature of the project. In this context, a strawman can take the form of an outline, a set of charts, a presentation or a paper.

Exercise 3.1: Strawman

Instructions:

Read the scenario below and complete the Strawman Decision Proposal.

- The order entry manager and the IT development manager have been arguing over how the decision on a new order entry system should be made.
- The order entry manager claims the he must have final say over the software choice, since it will impact his workload and daily quality of life for years to come.
- The IT development manager claims she must make the final decision, since she must be capable of installing and supporting the software.

Strawman Decision Proposal

Decision:

Impact/Criteria:

-
-
-
-

Proposed Decision Makers and Rationale:

- 1.

Proposed Decision Influencers and Approach:

Customer Pilot Team –

Order Entry Pilot Team –

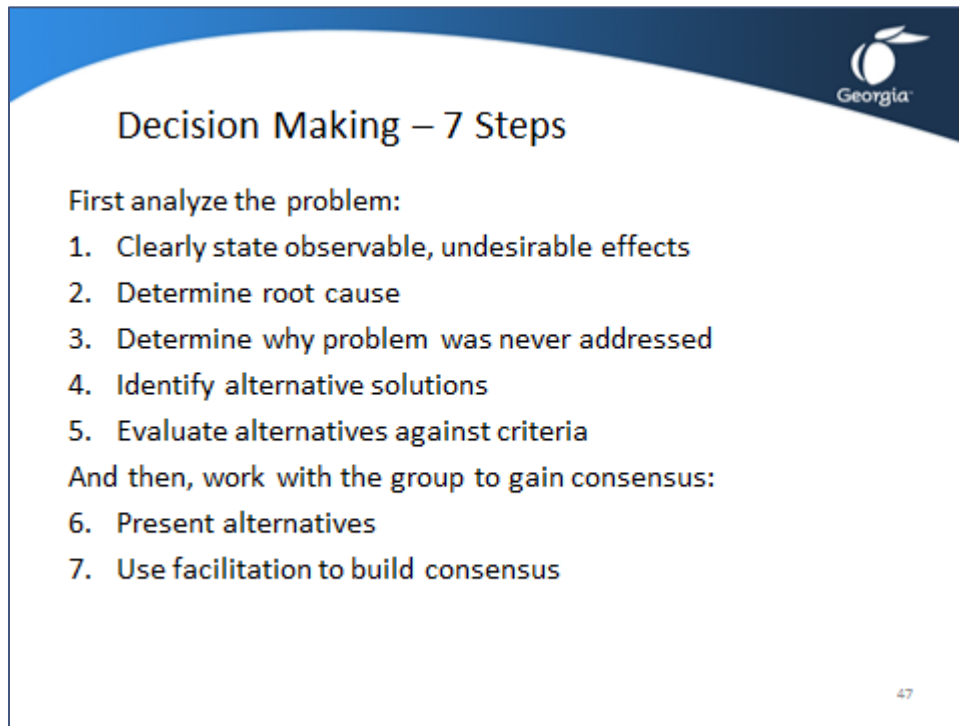
Finance –

Decision Required By: No later than

Proposed Decision Process:

- 1.
- 2.
- 3.
- 4.
- 5.

Topic 1: Decision Making – Seven Steps



Decision Making – 7 Steps

First analyze the problem:

1. Clearly state observable, undesirable effects
2. Determine root cause
3. Determine why problem was never addressed
4. Identify alternative solutions
5. Evaluate alternatives against criteria

And then, work with the group to gain consensus:

6. Present alternatives
7. Use facilitation to build consensus

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First, take time to analyze the problem.

Clearly state what you see as the undesirable effects that the problem is causing.

Try and uncover what the problem is really all about. Avoid being sidetracked by the symptoms.

Decide why the problem still exists and was never addressed.

Identify all possible alternative solutions.


Then evaluate the solutions against all known criteria.

Gain group consensus:

- Present alternatives, pros and cons and recommendations. Show how the solution overcomes the problem.
- Facilitate to build consensus and gain final agreement.

NOTE: Depending on your technical level of expertise, you may start the strawman and use that as a spring board for a brainstorming session, or get the group to collaborate, using the strawman as a tool to facilitate and direct the group discussion.

Topic 1: Decision Making – Evaluating Potential Solutions



Decision Making – Evaluating Solutions

- Personal Evaluation:
 - Does it make sense?
 - Does it sound right?
 - Does it feel right?
- Ramifications:
 - What result?
 - Are there negative side effects?
- Contingency:
 - What if someone withdraws support?
 - What if external conditions change?
 - What if the staff needed for the action is unavailable?
 - What if the decision is wrong?

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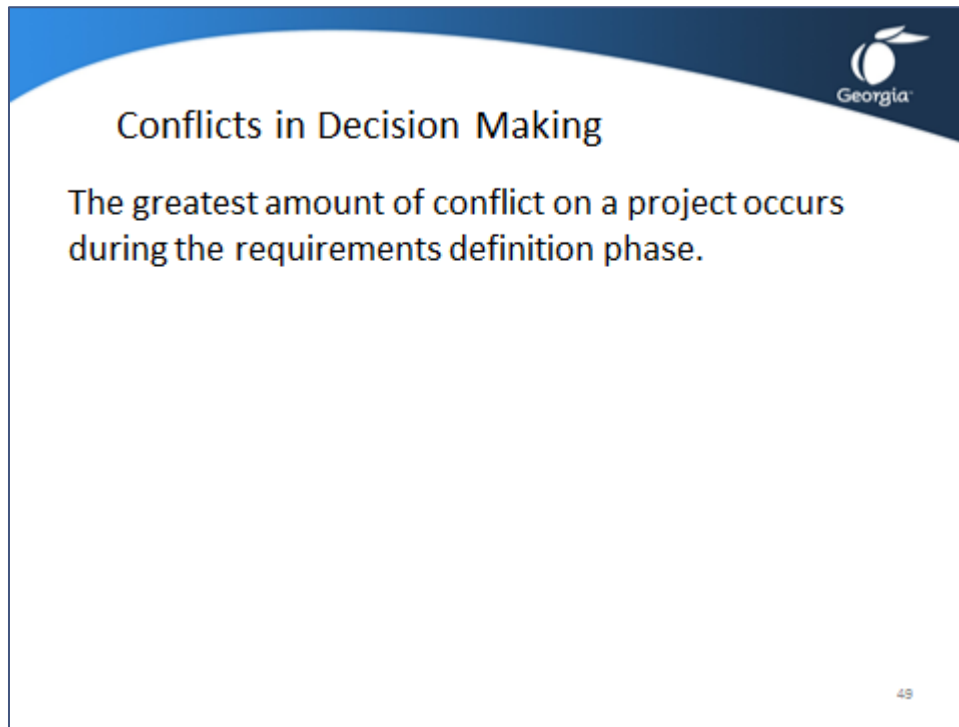
Intuition should not be discounted when evaluating a decision. Then look at the facts surrounding the ramifications.

Contingency is thinking about “what if...?”.

Thinking through the various scenarios will help lead you to a more robust and workable solution.

You may not always be able to answer contingency questions, but thinking about them makes you less likely to be sabotaged by a curve ball issue.

Topic 2: Conflicts in Decision Making



Conflicts in Decision Making

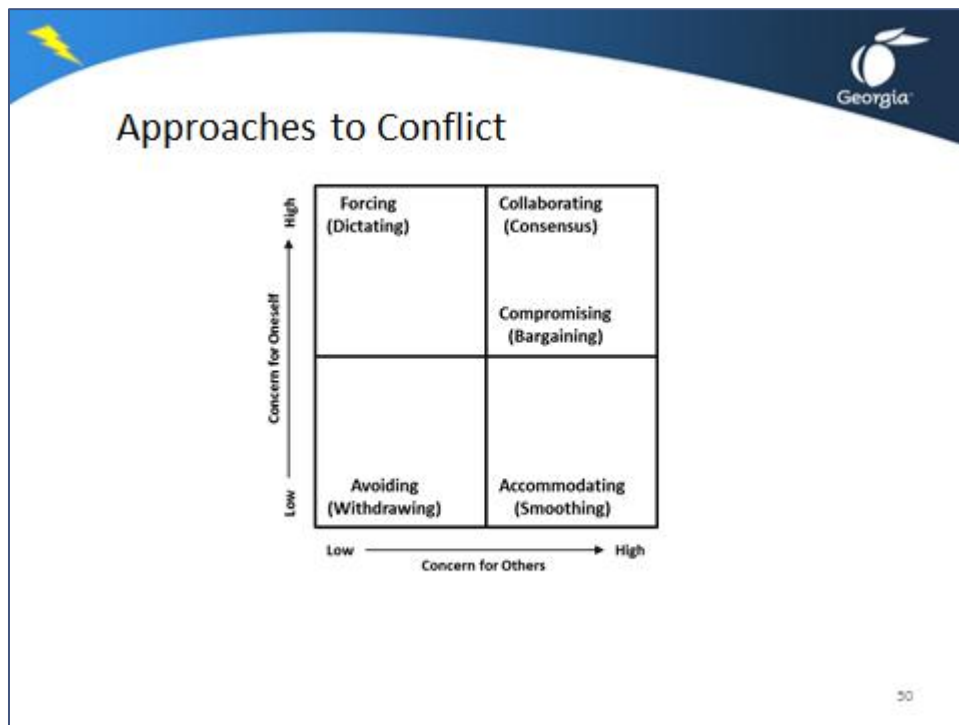
The greatest amount of conflict on a project occurs during the requirements definition phase.

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Remember the Tuckman Model of team formation

Forming
Storming
Norming
Performing

Topic 2: Approaches to Conflict



Conflict Approaches and applications:

Forcing: an individual pursues his or her own concerns at the other person's expense. This is a power-oriented mode in which one uses whatever power seems appropriate to win one's own position. Use forcing when you need a quick decision.


Avoiding: when a person does not pursue her/his own concerns or those of the other person. He/she does not address the conflict, but rather sidesteps, postpones or simply withdraws. Use avoiding when the context isn't suitable (it isn't the right time or place).

Accommodating: an individual neglects his/her own concerns to satisfy the concerns of the other person. There is an element of self-sacrifice in this mode. Use accommodating when the issue is not so important to you but it is to the other person.

Collaborating: involves an attempt to work with the other person to find some solution which fully satisfies the concerns of both persons. It includes identifying the underlying concerns of the two individuals and finding an alternative which meets both sets of concerns. Use collaboration when: 1) there is a high level of trust, 2) you want to gain commitment from others.

Compromising: is to find some expedient, mutually acceptable solution which partially satisfies both parties. It falls in the middle group between collaborating and accommodating. Use compromise: 1) when the goals are moderately important and not worth the use of more assertive modes, 2) when people of equal status are equally committed, 3) to reach temporary settlement on complex issues, 4) to reach expedient solutions on important issues, 5) as a back-up mode when accommodation and collaboration don't work.

Topic 2: Approaches to Conflict



Approaches to Conflict

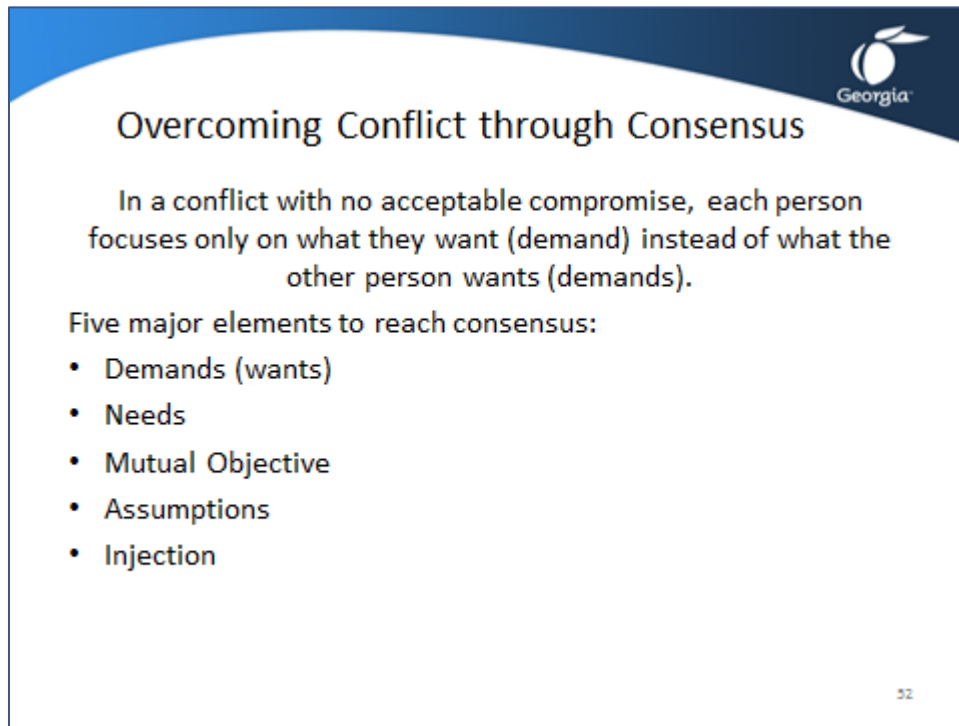
Style	Description	Effect
Avoiding (Withdrawing)	Retreats from actual or potential conflict situation	Does not solve the problem
Accommodating (Smoothing)	Emphasizes areas of agreement rather than areas of difference	Provides only short-term solutions
Compromising (Bargaining)	Searches and bargains for solutions that bring a degree of satisfaction to all parties	Provides definitive resolution
Forcing (Dictating)	Pushes one viewpoint at the expense of others; offers only win/lose solutions	Hard feelings may come back in other ways
Collaborating (Consensus)	Incorporates multiple viewpoints and insights; leads to consensus and commitment	Provides long-term resolution
Confronting/ Problem Solving	Treats conflict as a problem to be solved by examining alternatives; requires give-and-take and open dialogue	Provides ultimate resolution

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Compromising styles might sound good, but usually each side is giving up something and may carry some resentment or sense of loss.

Problem solving appears to always be associated with successful conflict management, however, this option may take more time than the situation allows.

Topic 2: Overcoming Conflict through Consensus



Overcoming Conflict through Consensus

In a conflict with no acceptable compromise, each person focuses only on what they want (demand) instead of what the other person wants (demands).

Five major elements to reach consensus:

- Demands (wants)
- Needs
- Mutual Objective
- Assumptions
- Injection

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“Seek first to understand, then to be understood” Stephen R. Covey, 1989, The 7 Habits of Highly Effective People.

Consensus Technique

Demands – What are we fighting about?

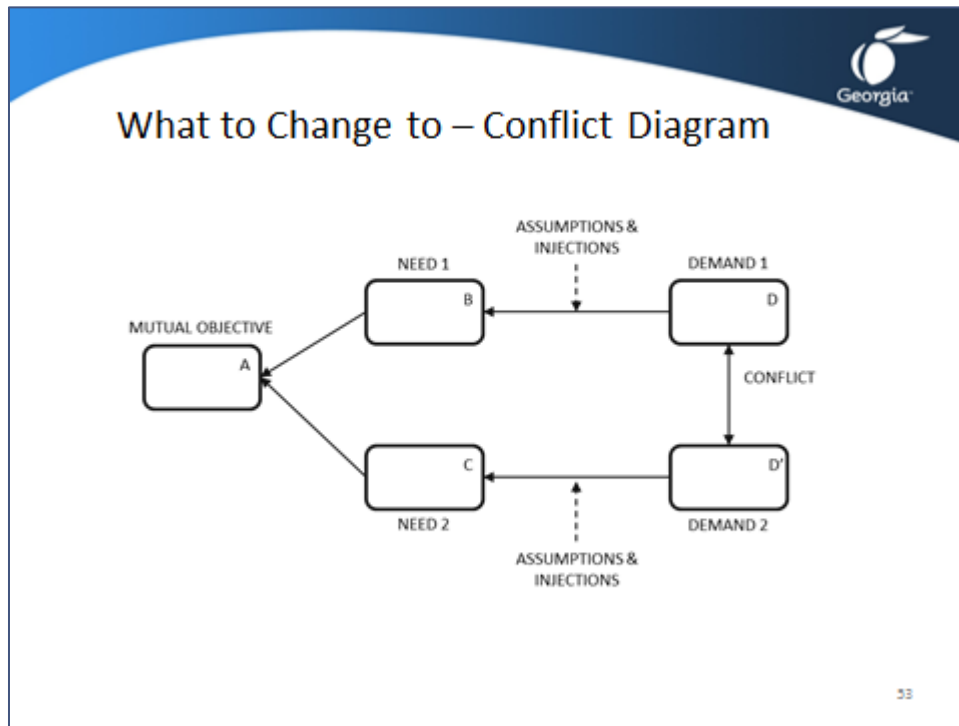
Needs – What are the unsatisfied, underlying needs driving the demands of each person?

Mutual Objectives – What do all parties gain is consensus is reached?

Assumptions – Why do we believe we can only meet our need by having our demand met?

Injection – The condition that signifies we have overcome an assumption and reached a win-win resolution.


Topic 2: What to Change to – Conflict Diagram Structure



Defining a conflict requires correctly identifying the needs that are driving each side to a specific demand (want). Only then can we begin to resolve a conflict using a win-win approach.

The conflict Diagram displays the demands of each party. It illustrates what the conflict is about, what the differences are, what each party feels they must have to win, and what the common ground or mutual objective is. It is a game plan for reaching consensus. Remember, demands (wants) are always driven by a need.

Topic 2: Conflict Example



Conflict Example

A project team is responsible for creating a revised company website within two months. The current web site is the subject of many customer complaints, especially about the complexity of finding information and ordering products. As a result, customer visits, purchases and leads from the web site have been declining rapidly.

Two weeks before the scheduled completion, the VP of Sales says, "The revised site must have a full membership capability with privileges for members. That's what will increase leads, which we need desperately."

The team analysis finds that this requirement would delay the project completion by six weeks. The CIO is opposed.

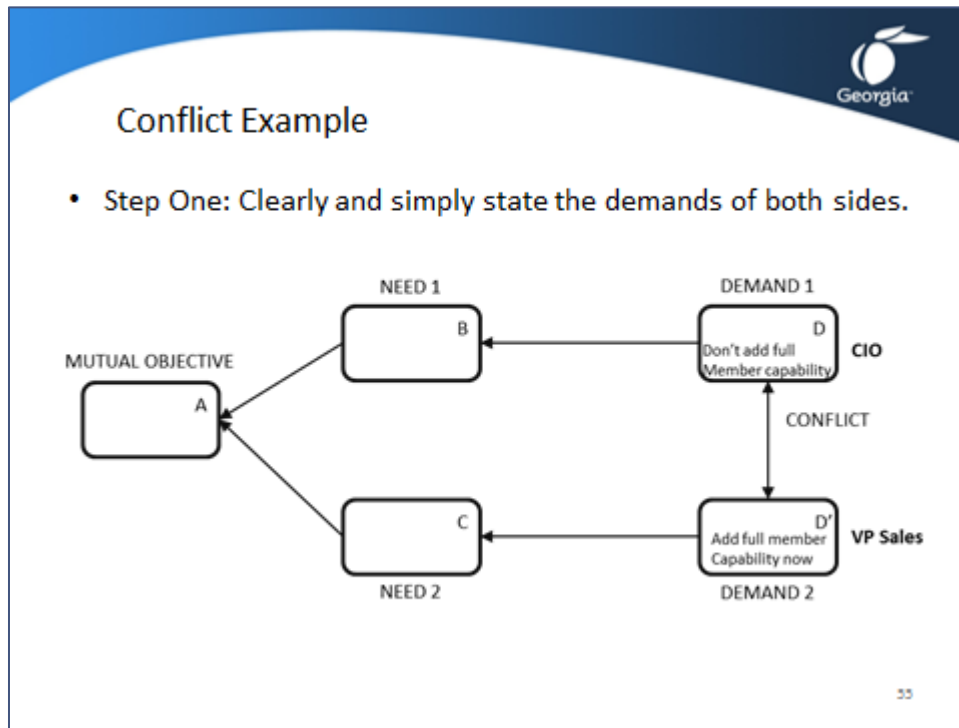
34

A win-win resolution is one that does not compromise the needs of either party.

Before the CIO can begin to successfully resolve the conflict with the VP Sales, she must be able to clearly define it.

Using the five boxes, the CIO can define her conflict with the VP Sales in three steps.

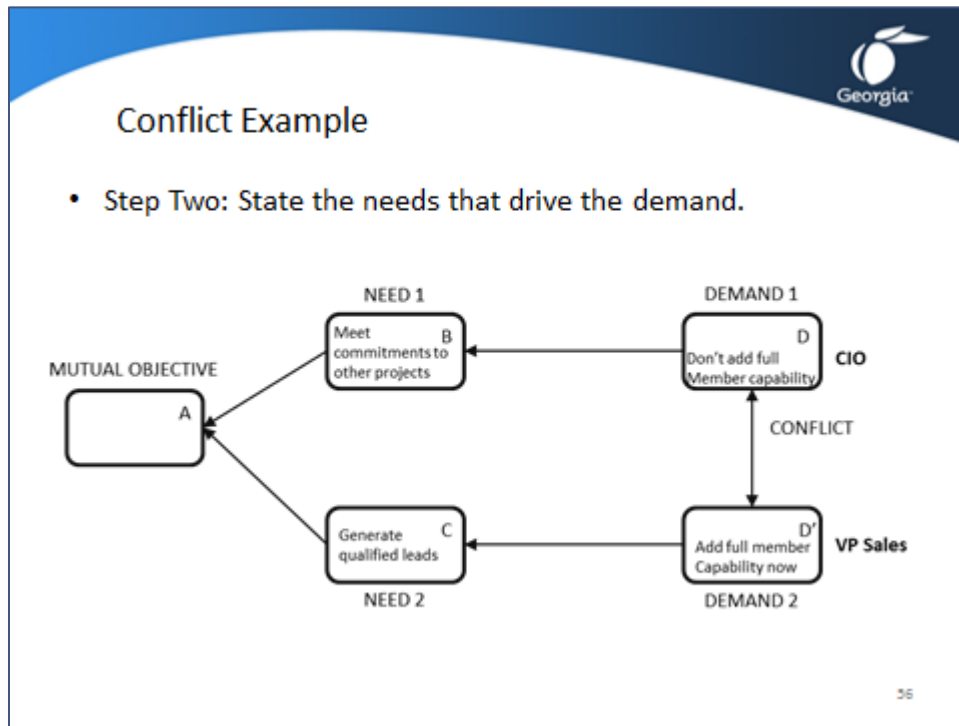
Topic 2: Conflict Example – Step 1: Define the Conflict



Step One: Clearly and simply state the demands of both sides.

Demands must be stated simply as opposites or mutual exclusives.

Topic 2: Conflict Example – Step 2: State the Needs



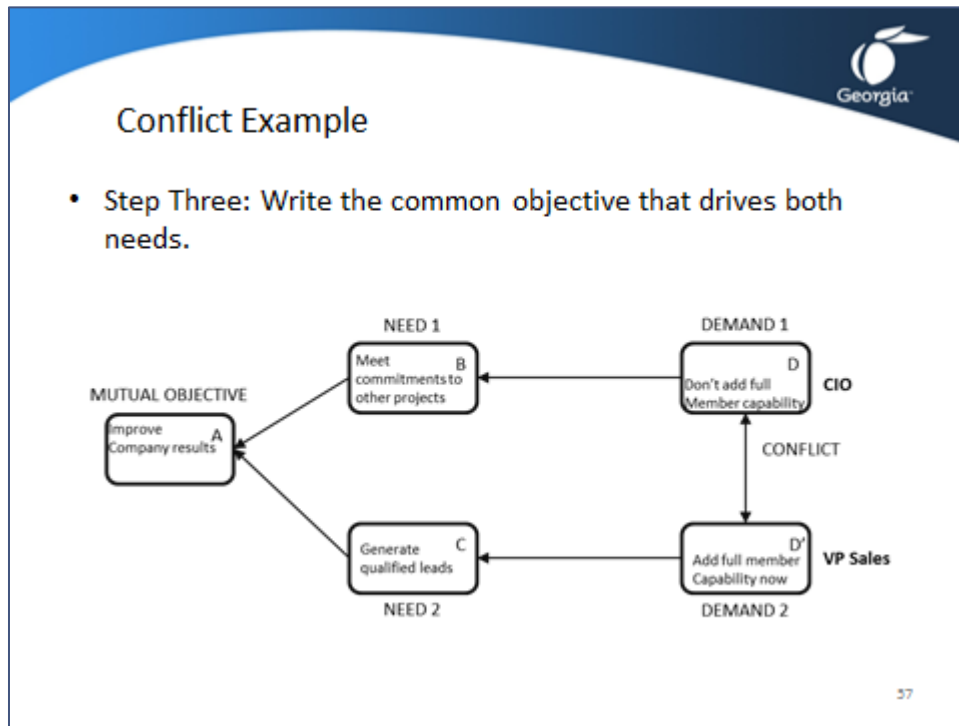
Step Two: State the needs that drive the demand.

What assumption is each side making?

Are there common alternatives that allow the common objective to be met?

Focus on the needs.

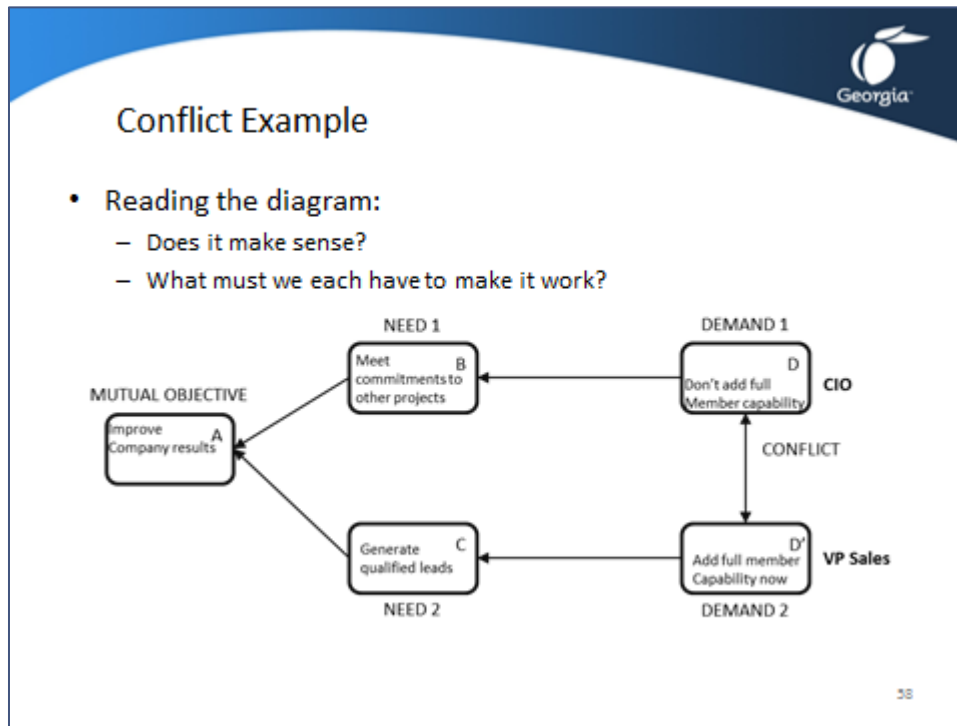
Topic 2: Conflict Example – Step 3: Write Common Objectives



Step Three: Write the common objective that drives both needs.

What drives both parties and the organization?


Topic 2: Conflict Example – Reading the Conflict Diagram



Read the conflict diagram from the tip of the arrow to the tail of the arrow, using the following format:

- “In order to have... (words in box at tip of arrow), I must have... (words in box at tail of arrow)”.

Topic 3: Exploring Solutions



Exploring Solutions

Win-win solutions happen when you:

- Identify the demands and needs in the conflict
- Clearly define the elements of the conflict (logically diagram the conflict)
- Explore solutions that do not compromise needs
- Ask people to subordinate their demands to the needs of others and to the higher needs of the project or organization

Win-win solutions are found by connecting:

- Surfacing assumptions
- Needs
- Demands

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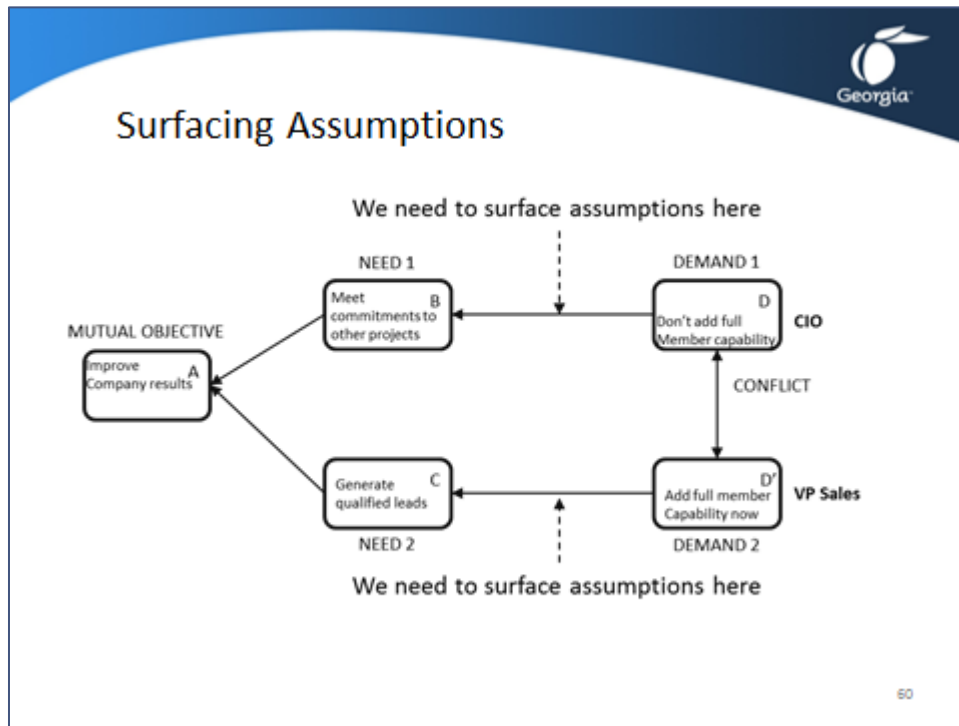
Win-win solutions stem from the ability of each party to see the situation as you and me against the problem, instead of you and me against each other. Identifying the problem and knowing what each person **MUST** have allows the process to focus on a solution and move forward.

Winning the other person's collaboration:

Key = Communications

- Agree on common objectives
- Show the other person that you understand and accept their needs as valid
- Bring the other person to recognize and accept your needs
- Come to consensus about what each person's position is
- Focus on needs versus demands (wants) and assumptions
- Allow the other person to offer a win-win solution first, so they don't feel set up
- Resolution is reached when both parties sense that the solution satisfies their needs and meets the common objective

Topic 3: Exploring Solutions – Surfacing Assumptions



We focus on assumptions underneath two arrows:


1. The arrow connecting B and D
 - a. Why are we so sure that we MUST have our demand, D to achieve need B?
2. The arrow connecting C and D'
 - a. Why does the other person assume that they MUST have their demand D' in order to satisfy their need C?

We surface the assumptions between the needs and demands as follows:

In order to have (B) I must have (D) because:

- Whatever follows "because" is the assumption that cements our belief that (D) must exist in order to have (B).
- We do the same for (C) and (D').

Topic 3: Exploring Solutions – Surfacing Assumptions Steps 1 & 2



Surfacing Assumptions

Surface assumptions in the example (B <- D)

- In order to meet commitments to other projects (B) we must not add the full membership capability now, (D) because:

Surface assumptions in the example (C <- D'):

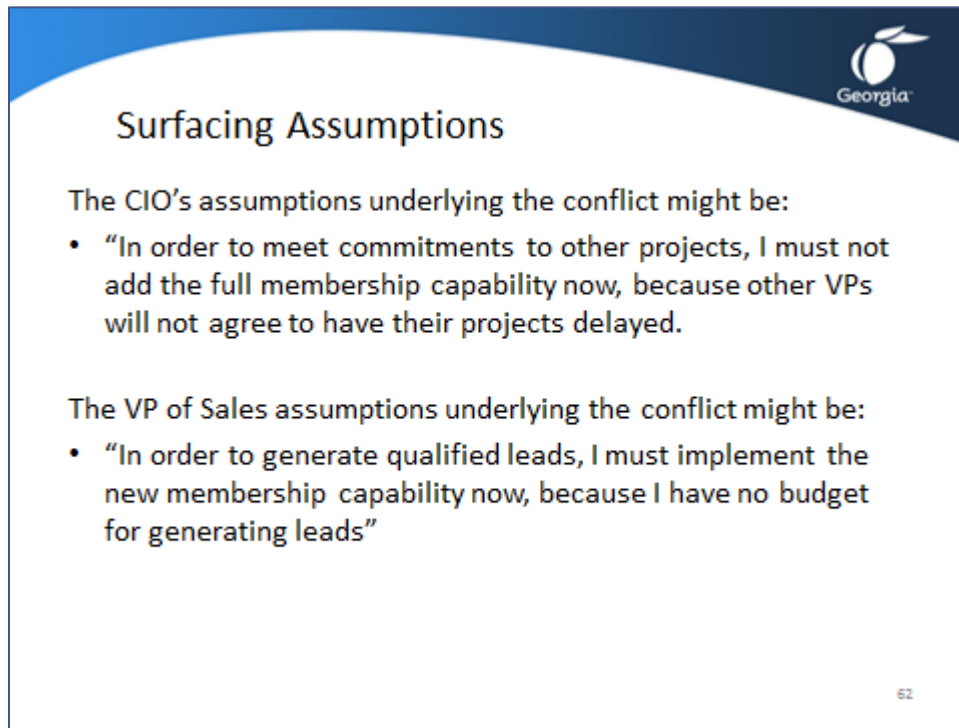
- In order to generate qualified leads © we must add full membership capability now, (D') because:

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What assumptions do you think are behind this demand?

How about the assumptions behind the second thought process?

Topic 3: Exploring Solutions – Surfacing Assumptions Steps 3 & 4



Surfacing Assumptions

The CIO's assumptions underlying the conflict might be:

- “In order to meet commitments to other projects, I must not add the full membership capability now, because other VPs will not agree to have their projects delayed.

The VP of Sales assumptions underlying the conflict might be:

- “In order to generate qualified leads, I must implement the new membership capability now, because I have no budget for generating leads”

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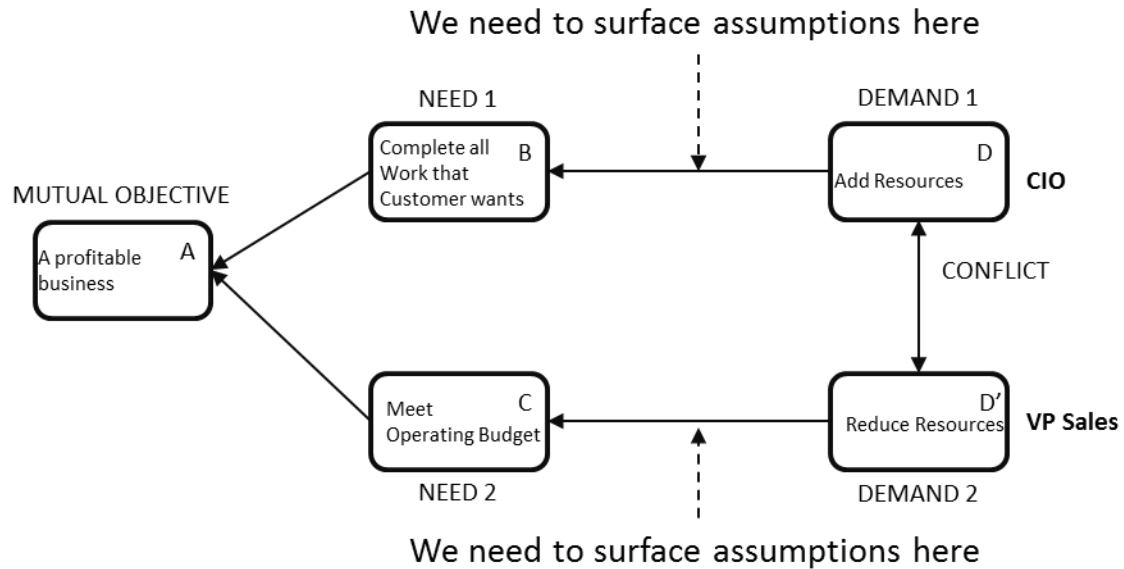
The CIO's Assumption: Can you think of a way to overcome this assumption – a proposed solution?
Does your proposed solution violate the needs on either side of the conflict?

The VP Sales Assumption: Can you think of a way to overcome or invalidate this assumption – a proposed solution?
Does your proposed solution (injection) violate the needs on either side of the conflict?

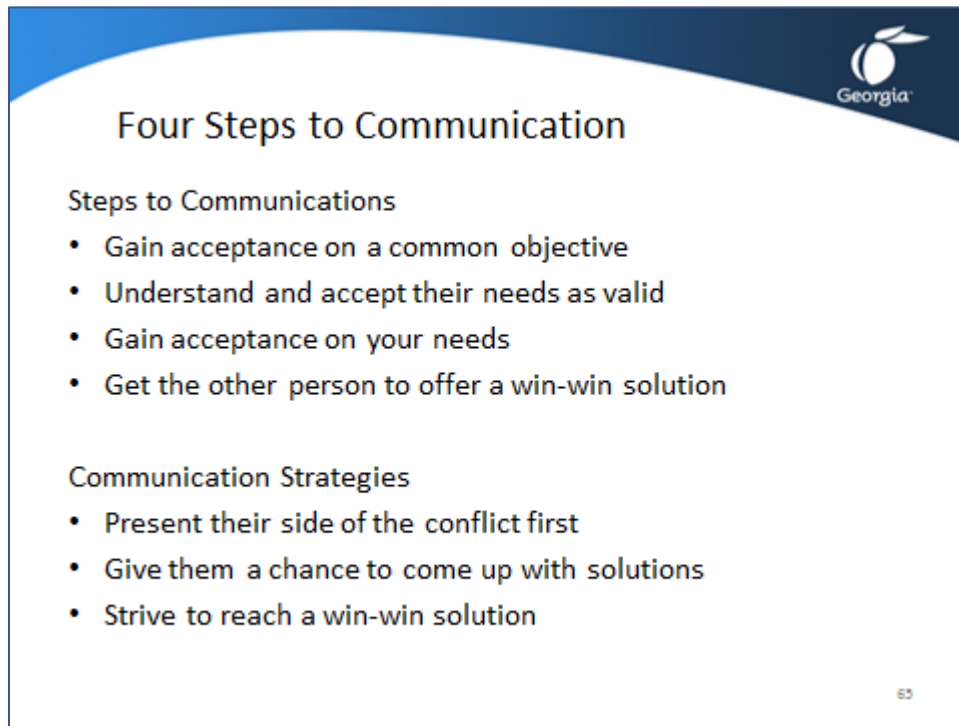
Exercise 3.2: Surfacing Assumptions

Instructions:

You have logically diagrammed your conflict with the other person and explored possible solutions. Now, how do you win the other person's collaboration? To win the other side's collaboration in successfully resolving this conflict, you will need to follow four steps in sequence



Topic 3: Exploring Solutions – Four Steps to Communication



Four Steps to Communication

Steps to Communications

- Gain acceptance on a common objective
- Understand and accept their needs as valid
- Gain acceptance on your needs
- Get the other person to offer a win-win solution

Communication Strategies

- Present their side of the conflict first
- Give them a chance to come up with solutions
- Strive to reach a win-win solution

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The first step is agreeing on the common objective. With a common goal in mind, you know what a successful outcome should look like. Make sure they know that you understand their side. This is a prerequisite to having them be willing to hear your side. Remember seek first to understand, before trying to be understood.


Next, bring them to an understanding and acceptance of what you need. This does not mean you agree with each other, but you have acknowledged your mutual needs.

Why try to find valid solutions on both sides, before starting a communication with the other party? Even if you have not resolved the conflict at this point, you have made progress. You are no longer working against each other. You now understand each other's needs and demands and are ready to focus on the problem.

Offering your solution may cause the other person to become suspicious of the entire process and feel they have been manipulated. Give the other side a chance to come up with possible solutions. Keep the process going by continuing to talk and listen to the other side.

Strive to improve and maintain communication with the other person at this point until a win-win solution is found.

Topic 3: Exploring Solutions – Build Allies Not Adversaries



Build Allies not Adversaries

“... replace the crutch of authority with the engine of influence”
“Influence without Authority”

- Pay attention to other’s needs and concerns
- Consider others as potential allies, not adversaries
- Build credits and potential for future collaboration
- Do not write off uncooperative persons as hopeless enemies
- Create trust, collaboration and mutual influence
- Be proactive and strategic

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Lesson 3 Summary: Learning Objectives Recap

- **Understand the decision making process**

Problem solving and decision making are virtually identical. They are critical because they are the generic process that underlies planning, setting priorities, defining requirements, designing, addressing issues, and deciding whether to make a change or postpone it.

- **Understand how to use a strawman approach to reach consensus**

the strawman is an object, document, person or argument that *temporarily* stands in for and is *intended to be replaced by* something more substantial.

- **Understand how to use a conflict diagram**

Defining a conflict requires correctly identifying the needs that are driving each side to a specific demand (want). Only then can we begin to resolve a conflict using a win-win approach.

The conflict Diagram displays the demands of each party. It illustrates what the conflict is about, what the differences are, what each party feels they must have to win, and what the common ground or mutual objective is. It is a game plan for reaching consensus. Remember, demands (wants) are always driven by a need.

LESSON 4: COMMUNICATION ISSUES

Topic 1: A Communications Focus

Topic 2: Active Listening

Topic 3: Communication Styles

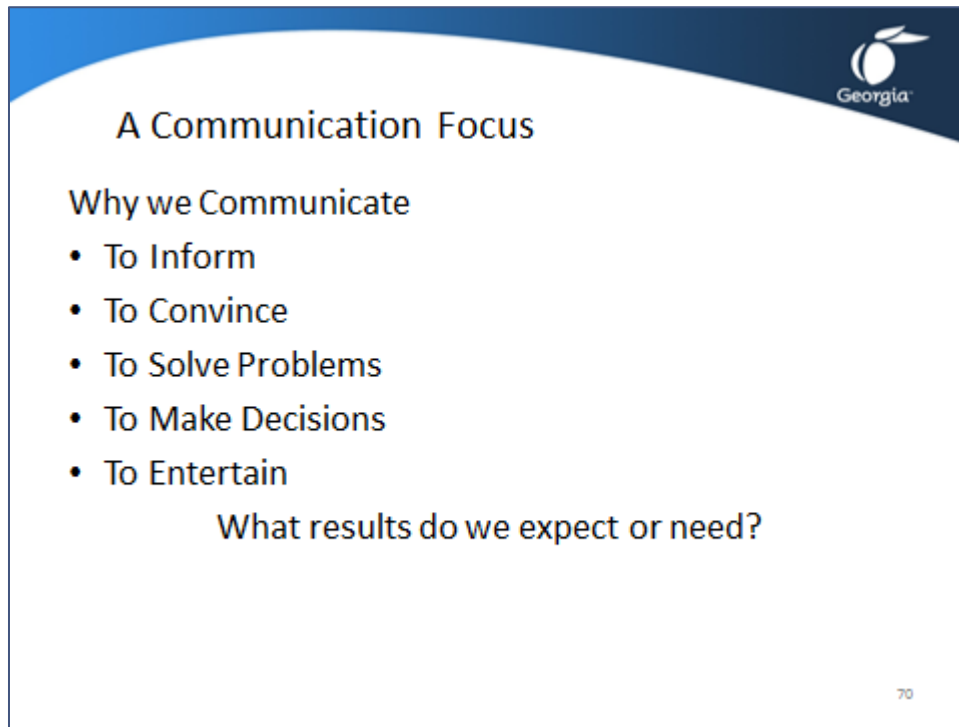
Student Learning Objectives

After completing this lesson you should be able to

- Understand the principles of active listening
- Understand the four different communication styles that affect communication success

Approximate Presentation time: 2 hours 30 minutes

Topic 1: A Communications Focus



A Communication Focus

Why we Communicate

- To Inform
- To Convince
- To Solve Problems
- To Make Decisions
- To Entertain

What results do we expect or need?

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When we communicate, we have a purpose. Effective communication is a two-way process, in which our intent generally achieves the reaction we're looking for. Being successful when communicating is partly based on being clear on your objective at the outset.

Exercise 4.1: Why Don't We Get the Expected Results?

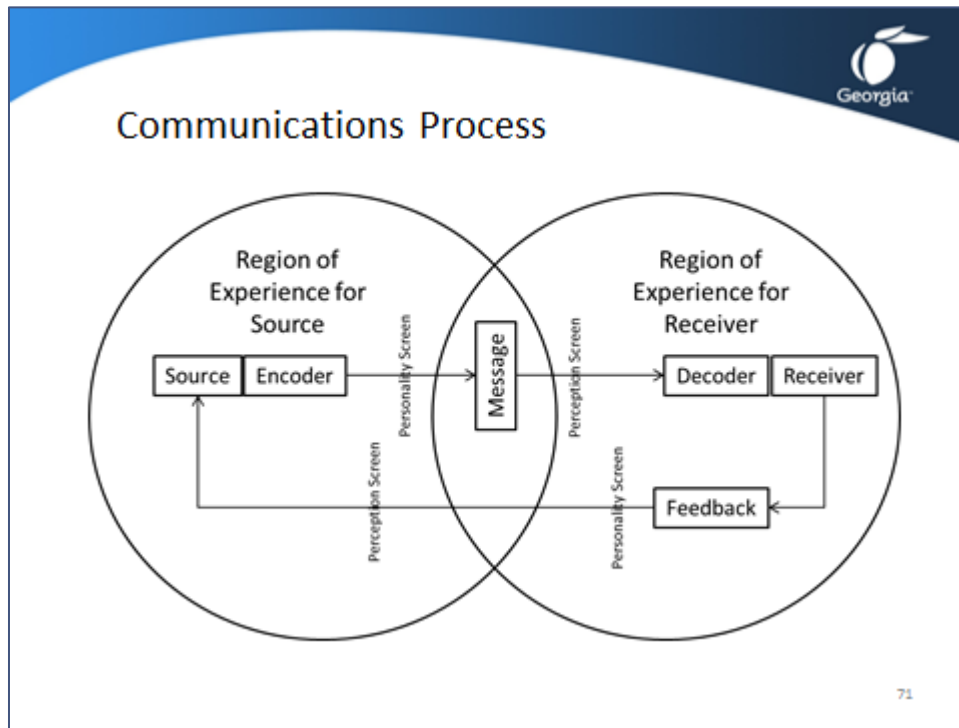
Instructions:

Sometimes when we communicate with people, either written or verbally, the results do not match up with our expectations or intended results.

Working with your team, discuss the question below, and list any reasons for failed communication that you can generate. Be prepared to share your list with the group.

Question: Why don't we get the expected results when communication fails?

Topic 1: Communications Process



Communication occurs when the idea the receiver understands is the idea the sender intended to send.

Each person views the world from a subjective perspective. Their perspective is based on personal experience, training and conditioning, language, culture and other factors.

We must be careful to make sure we really understand each other.

Feedback enables validation that the message was received and understood as it was intended by the sender (source).

The critical elements of communication:

- The idea that you want to communicate
- How the idea is encoded into language
- How it gets transmitted (media, environment, etc.)
- How it gets decoded (translated) by the receiver
- What the receiver thinks the message means
- The receiver's response to the idea
- How that is encoded
- How it is transmitted
- How the sender decodes the response
- The meaning of the response to the sender

Original Reference: D.I. Cleland & H. Kerzner, Engineering Team Management (Melbourne, Florida: Krieger, 1986), p. 46

Topic 2: Active Listening



Active Listening

- Listening is paying attention to:
 - What others say
 - How they say it
 - What they do when they say it
 - What they do when you speak
 - How they behave
- Listening is an **ACTIVE** process

聽

Annotations for the character 聽:
EAR (left side)
YOU (top right)
EYES (middle right)
UNDIVIDED ATTENTION (bottom right)
HEART (base)

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This striking calligraphy is made up of smaller symbols with specific meanings.

The entire left side represents the **EAR**, focusing on our primary organ used in listening.


The right side begins with **YOU**, the individual, indicating that the focus is on the other person, not on yourself.

Underneath **YOU** are **EYES** and **UNDIVIDED ATTENTION**. Good listeners use their eyes to pay close attention to the speaker, giving well-deserved undivided attention.

The base of the symbol is the **HEART**, which opens up our listening on the emotional level.

Listening is all encompassing, and only when we embrace that can we be regarded as an exceptional listener.

Topic 2: Active Listening



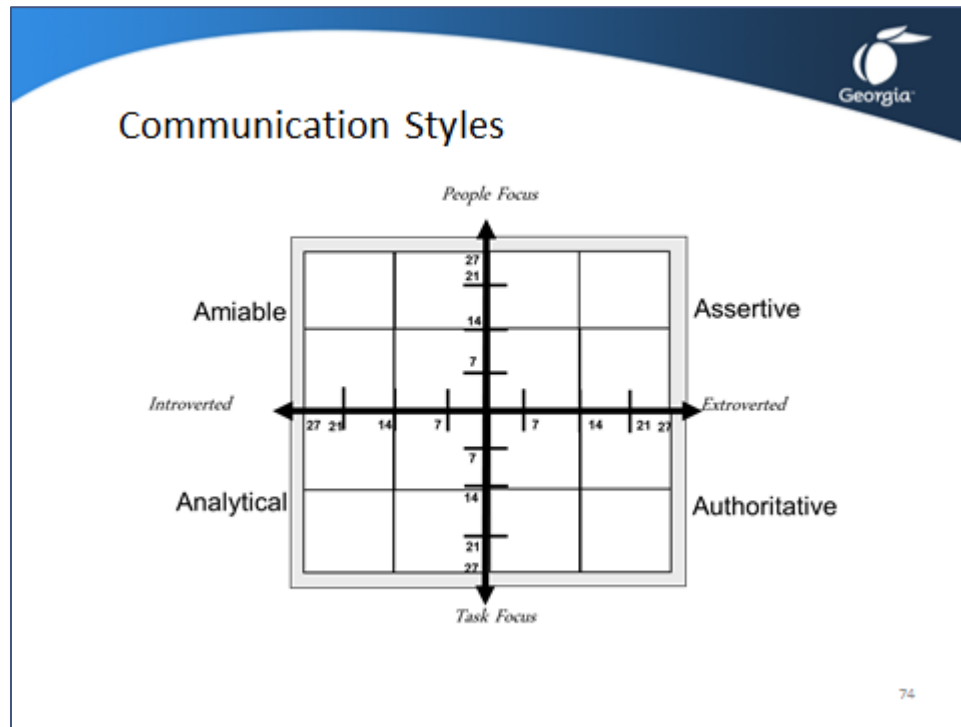
Active Listening

- Attend to the speaker through eye contact, open posture and supportive gestures
- Paraphrase and restate to confirm your understanding
- Ask questions when clarification is needed
- Summarize – pull together, organize and interpret the major aspects of your dialogue
- Empathize – reflect content and feelings
 - “you feel (state feeling), because (state content)”

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Feed the information back to the sender to make sure you understood it. Check your perceptions (assumptions) – “let me see if I’ve got it straight...” Involve them in additional dialogue when there is confusion.

Topic 3: Communication Styles



Because we feel that project managers must first be master communicators it is important that we understand our own communication style and the communication styles of others on the project team.

The golden rule states "Do unto others as you would have them do unto you."

This is often the way we communicate with others. We often communicate with others the way we prefer to be communicated with. There are four basic areas of communication styles and unfortunately when we choose to stay in one style exclusively of the other three styles we are only going to communicate effectively with one fourth of the individuals we are trying to motivate, relate to, instruct, gain information from. As a project manager with various team members and project stakeholders your project cannot afford for you to communicate effectively only one fourth of the time.

In this segment our goal is for you to understand your own communication style and the communication styles and needs of others so you can more effectively communicate and raise the success ratio of your projects as a result.

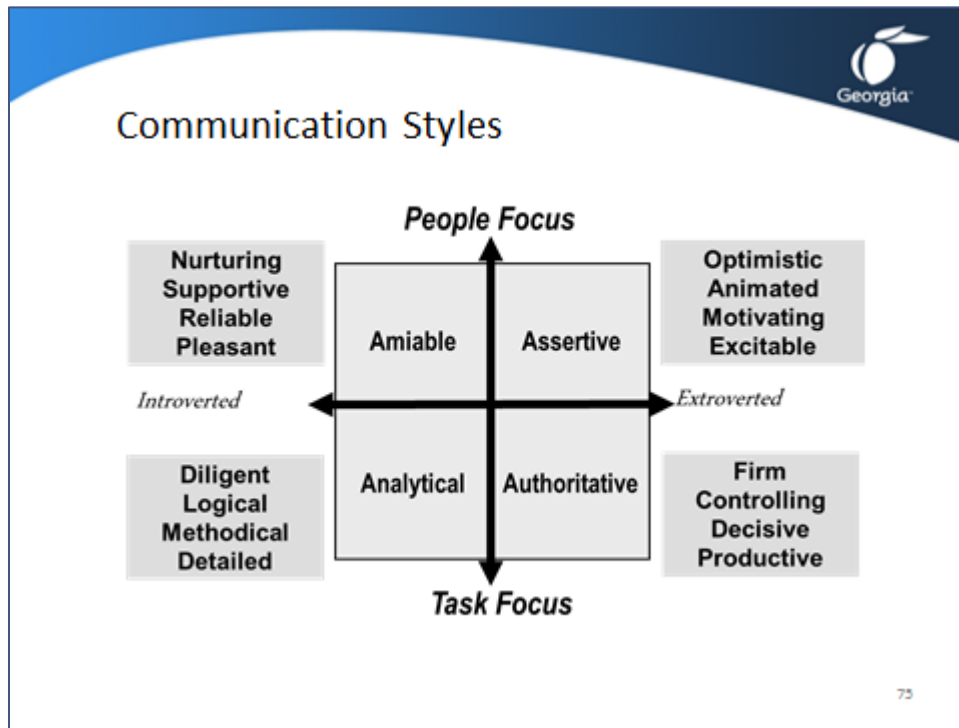
It is not enough to know your style, as a project manager you must also understand each of the other styles and their needs so you can meet those needs when necessary during the project life cycle

If we drew a line down the middle of the room and on the back wall we printed the word PEOPLE and on the near wall we printed the word TASK and then ask each of you to line up on the black line according to where you felt most comfortable. For instance if you were people oriented you would position yourself closer to the people wall, if you were more comfortable with the tasks or deliverables you might position yourself closer to the task wall. Each of you will position yourself in a different place on the line because we each have a different comfort zone when it comes to people or emotions and tasks or deliverables as it relates to our projects.

There is not a right or wrong to this comfort zone it simply means that we each have a different comfort zone and it is important that we understand where we place ourselves and also that each of the members of our team will also be in a different place than we are. Interestingly, regardless of where we find ourselves on this comfort zone we all need to have the ability to communicate the needs of the project as it progresses through the phases of the project life cycle.

We are going to take a look at our work styles and how our comfort zone affects the method we choose to communicate in most often and the results we can expect from each of these styles.

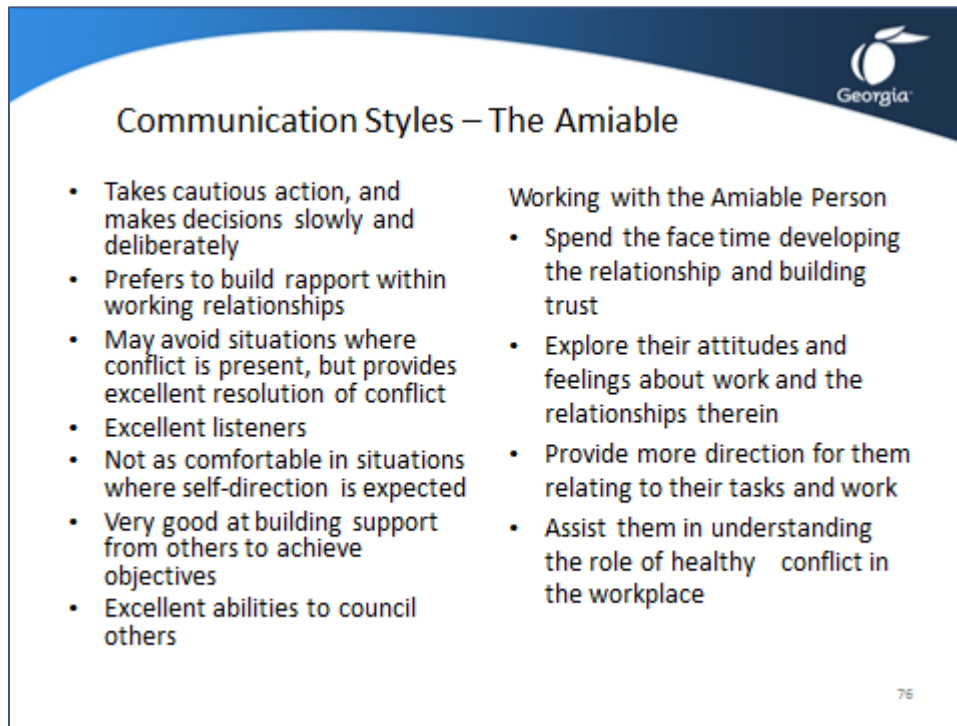
Topic 3: Communication Styles



Here are some quick insights into the four styles we will be discussing. Each of us possess a reasonable amount of each of these styles, but often we stay in one or two of them because of our comfort zone.

The major area is where we live and function most often, the secondary style is where we most often go during stress or conflict. What we want to know is what is our major area of communication and what is our second area or our fall back zone.

Topic 3: Communication Styles – The Amiable



Communication Styles – The Amiable

- Takes cautious action, and makes decisions slowly and deliberately
- Prefers to build rapport within working relationships
- May avoid situations where conflict is present, but provides excellent resolution of conflict
- Excellent listeners
- Not as comfortable in situations where self-direction is expected
- Very good at building support from others to achieve objectives
- Excellent abilities to counsel others

Working with the Amiable Person

- Spend the face time developing the relationship and building trust
- Explore their attitudes and feelings about work and the relationships therein
- Provide more direction for them relating to their tasks and work
- Assist them in understanding the role of healthy conflict in the workplace

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The Amiable

The amiable is the people person. This is the person who would be near the people or emotion side of the room. These are the individuals who need to form relationships and have information about the people on their team. They are most comfortable if they have some face time with you and eye contact when talking. These individuals tend to take the pulse of the room before jumping into conversation. They may precede their questions about the project with more personal or benign references before getting to the point of the project conversation. They are very good at reading the other persons emotions.


If the amiable have a weakness as a project manager it is they tend to not want to face conflict and may want to ignore it longer than is necessary. But, it must be stated here, once the amiable learns how to work through their conflict issues they make great facilitators. This is because they are good listeners and will give both sides the attention needed to make an independent solution.

Working with the Amiable

If you are not an amiable you will need to work with an amiable and you need to understand that they will require some face time with you. The type of relationship you take the time to build with them now will serve you well not only in this project but projects to come. Give an amiable eye contact. Allow them to explain themselves in their own words and listen to how they say things as well as what they are saying. Ask them what they recommend, because they are also very good at problem solving situations.

Take the time to understand the amiable work style. You will reap the rewards for a long time. Help them handle and understand conflict in a positive manner. Prepare them ahead of time if you know the situation may become heated.

Topic 3: Communication Styles – The Assertive



Communication Styles – The Assertive

- Works in a very spontaneous and quick manner
- Prefers the involvement of many people and prefers to play the role of leader within the group
- Avoids tasks which requires working alone
- Communication is picturesque and exaggerated
- Feels more comfortable working with generalized concepts, difficult with detail
- Strong dreamweavers
- Has tendencies to jump from one activity to another
- Seeks recognition and acknowledgement from others

Working with the Assertive Person

- Allow them to dream and infect other team members with a vision
- Give them credit openly when it is due to them – praise them often for success
- Set expectations for deliverables in a clear, detailed manner
- Encourage them to become better listeners

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The Assertive

The assertive is the tiger of the group. They tend to bounce around from subject to subject. They get excited and are good at getting buy-in from other team members. They also keep the project moving forward. An assertive does not like solitary roles and because of this they tend to work well in groups. Often they do not say no because they like to be involved in many different areas and interests. This trait is often the precursor to burn out. This is the individual with a great many activities and often unfinished activities.

An assertive likes to be recognized and be in the public spotlight. You will not embarrass them by calling on them in a group, they like to be center stage and in the thick of things. An assertive tends to communicate with lots of expression and big picture scenarios. They do not get caught up with the details or statistics.

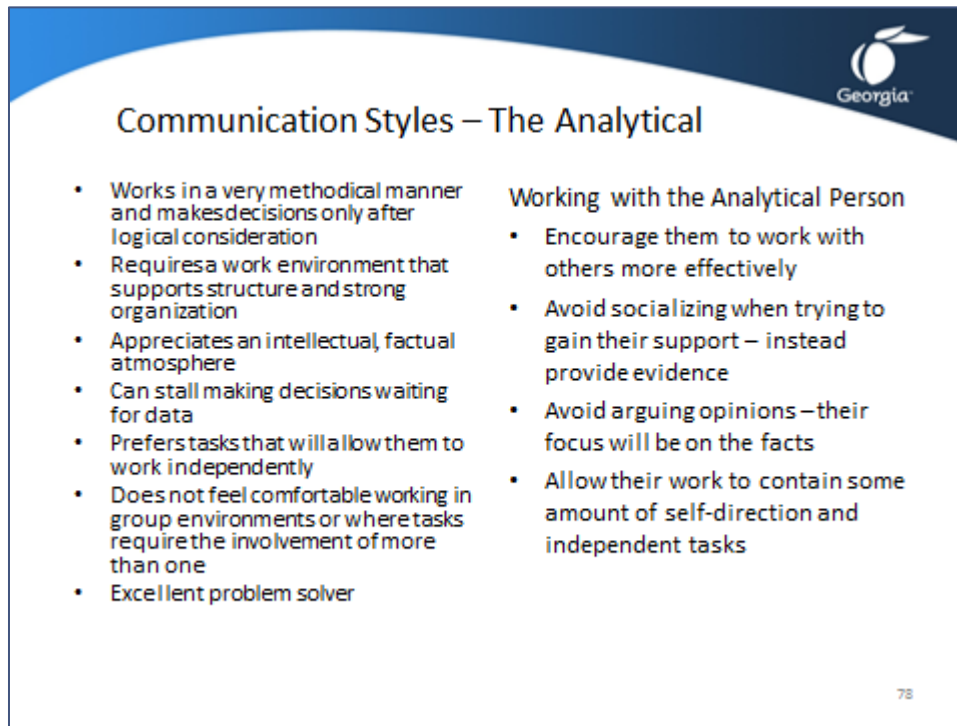
Working with the Assertive

Because of their communication style, the assertive does not make the best listener. In fact they are the worst listeners of the group. They make decisions quickly and are often on another subject and do not follow the flow of the conversation. The assertive is the one who will finish your sentence for you or interrupt often. The assertive individual needs to work on their listening skills and pay more attention to details.

An assertive often makes decisions based on “gut” feeling and therefore does not wait to get needed information.

When working with the assertive give them end dates for their projects and help them to see the priority of tasks. Because an assertive takes on more than they can sometimes accomplish they would benefit from priority organization. If you are an assertive and need to be a better communicator, learn to bullet point your main areas of concern and make sure you have the necessary facts before starting the conversation

Topic 3: Communication Styles – The Analytical



Communication Styles – The Analytical

- Works in a very methodical manner and makes decisions only after logical consideration
- Requires a work environment that supports structure and strong organization
- Appreciates an intellectual, factual atmosphere
- Can stall making decisions waiting for data
- Prefers tasks that will allow them to work independently
- Does not feel comfortable working in group environments or where tasks require the involvement of more than one
- Excellent problem solver

Working with the Analytical Person

- Encourage them to work with others more effectively
- Avoid socializing when trying to gain their support – instead provide evidence
- Avoid arguing opinions – their focus will be on the facts
- Allow their work to contain some amount of self-direction and independent tasks

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The Analytical

The analytical is the one style who loves the details and the data. They cannot get enough and there lies their major problem. Often they can get stuck waiting for more information or data and the project bogs down. Because of their thoroughness, they will always want to make it better.

The analytical is very self-directed and may choose often to work alone. They need to be encouraged to participate more as a group.

The analytical is an excellent problem solver. The one thing an analytical will not do is to compete for air space. They will often remain quiet until called on or asked for their opinion. An analytical will make their decisions with information, so it may take them longer to make a decision than an assertive or authoritative that is more emotionally driven.

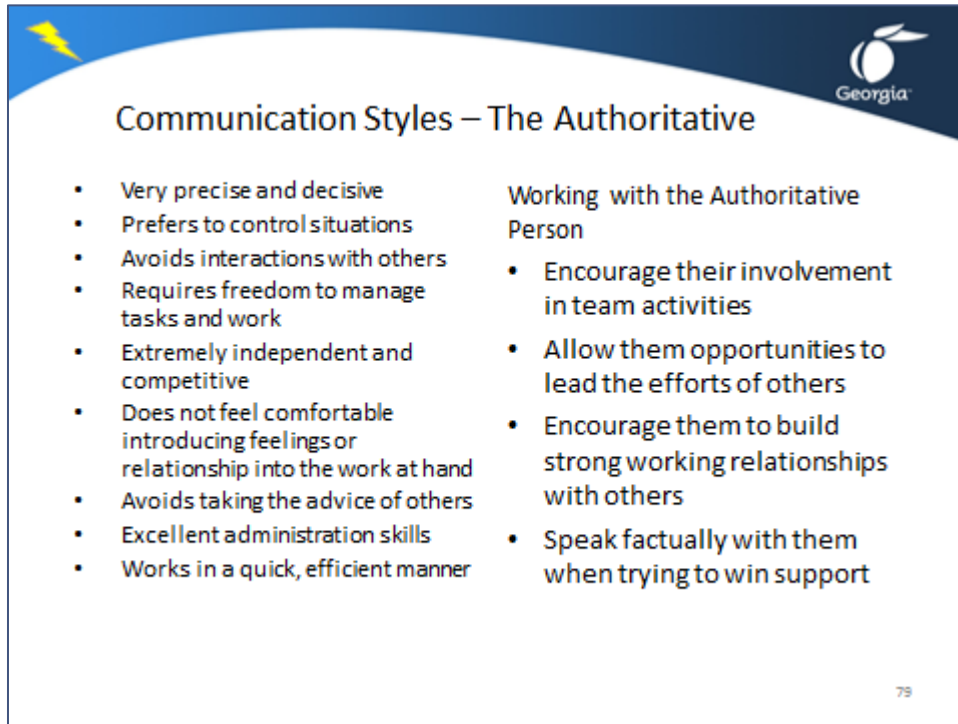
As a facilitator it is critical that you understand who the analytical and amiable individuals in the room are so they can be brought into the discussion.

Working with the Analytical

“Just the facts!” This is how you get the interest of an analytical. They are not that interested in the beginning on how you feel about an issue. They want data to support the decision. Encourage them to work in groups and to participate in team activities.

An analytical may need you to let them know enough is enough. That it is good enough and it is time to move on. An analytical can get caught up in the details and lose sight of the big picture.

Topic 3: Communication Styles – The Authoritative



Communication Styles – The Authoritative

- Very precise and decisive
- Prefers to control situations
- Avoids interactions with others
- Requires freedom to manage tasks and work
- Extremely independent and competitive
- Does not feel comfortable introducing feelings or relationship into the work at hand
- Avoids taking the advice of others
- Excellent administration skills
- Works in a quick, efficient manner

Working with the Authoritative Person

- Encourage their involvement in team activities
- Allow them opportunities to lead the efforts of others
- Encourage them to build strong working relationships with others
- Speak factually with them when trying to win support

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The Authoritative

The authoritative is deliverable driven and resides on the extrovert side of the grid so they are not shy about letting you know what they think about a situation.

This style is self-motivated and feels comfortable with the position of power. They make their decisions based on gut feeling but look for data to support it. They work best when information is concise and to the point. They hate to waste time with trivia, like, “How are you?” They get to the point fast and make decisions just as quickly.

You will not offend an authoritative by being brisk in manner. They prefer their discussions be in bullet points and in priority.

Working with the Authoritative

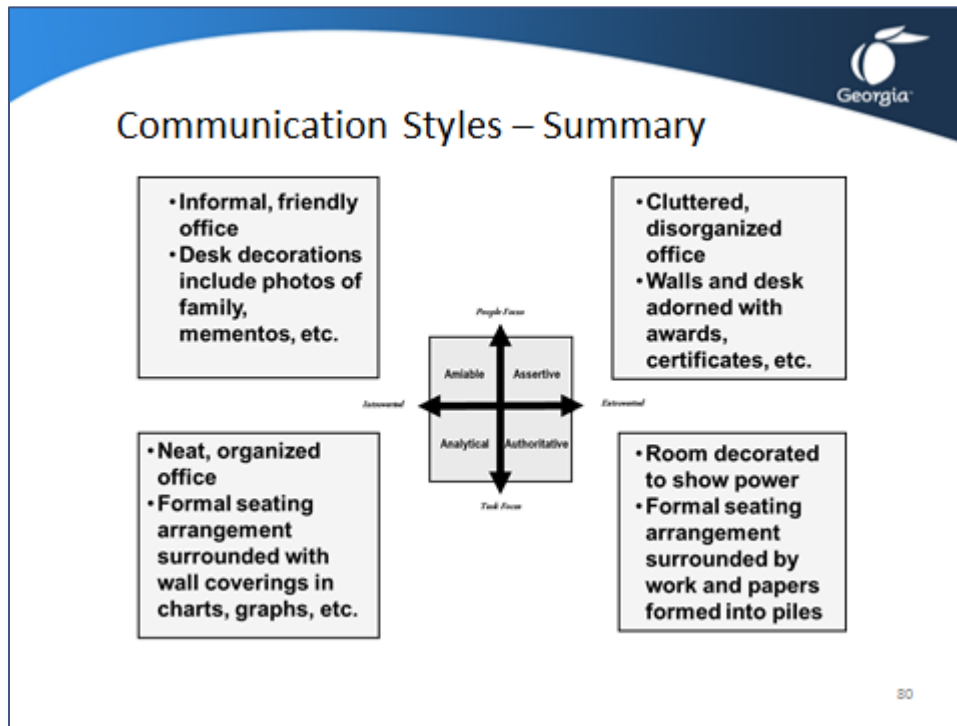
If you need to give the authoritative information be prepared and have data to back up your decisions and make it quick and to the point then get out.

When emailing an authoritative make sure you state on the first line what you are asking for. If they want more information they will ask for it.

If the authoritative have a weakness it is they tend not to seek out others opinions. They make the decision and go with it. Unfortunately they are in a project and team environment and often others have opinions that should be considered.

The authoritative needs to understand that others do not always make decisions as quickly as they do and may need time to come to a decision they are comfortable with.

Topic 3: Communication Styles – Summary



Here are some quick ways to recognize the different styles by their work environment. Not all of these will be relevant for each of you but take a look and see if any of them apply.

Amiable is most often the collector, they have photos, pins, banners and decorate for each holiday as it comes.

Analytical is the clean-desker. They will only have on their desk things that they need in the moment. They like to clean their desks at the end of each day complete their punch list and start fresh.

Assertive will have a cluttered desk. They will get overwhelmed and put everything in a box under their desks. You will hear an assertive say “But, I know where everything is!”

Authoritative prefer show of power. They like to have large desks and hang certificates on their walls. This style will put things in stacks. The piles will be in order of importance.

Communication Style Summary

	Authoritative	Assertive	Amiable	Analytical
Measures Personal Value By	RESULTS	APPLAUSE	ATTENTION	ACTIVITY
For Growth Needs To	LISTEN	CHECK	INITIATE	DECIDE
Let Them Save	TIME	EFFORT	RELATIONSHIPS	FACE
Needs Climate That	ALLOWS TO BUILD OWN STRUCTURE	INSPIRES TO THEIR GOALS	SUGGESTS	PROVIDES DETAILS
Take Time To Be	EFFICIENT	STIMULATING	AGREEABLE	ACCURATE
Support Their	CONCLUSIONS & ACTIONS	DREAMS & INTUITIONS	RELATIONSHIPS & FEELINGS	PRINCIPLES & THINKING
Give Benefits That Answer	WHAT?	WHO?	WHY?	HOW?
For Decisions Give Them	OPTIONS & PROBABILITIES	TESTIMONY & INCENTIVES	GUARANTEES & ASSURANCES	EVIDENCE & SERVICE
Specialty	CONTROL	SOCIAL	SUPPORTIVE	TECHNICAL
Backup Style	AUTOCRATIC	ATTACKER	ACQUIESCER	AVOIDER

Exercise 4.1: Determine Your Communication Style

Instructions:

For each statement pair, you must distribute three points between the two choices. Choose your scoring based on how you DO behave instead of how you believe you SHOULD behave.

How to score:

If A is very much like you and B is not, assign 3 points to A and 0 points to B.

If A is more like you than B, assign 2 points to A and 1 point to B.

If B is more like you than A, assign 2 points to B and 1 point to A.

If B is very much like you and A is not, assign 3 points to B and 0 points to A.

Score	Key	Question
	1A	I tend to speak very directly and make more statements
	1B	I tend to speak less directly and ask more questions
	2A	I need concepts and results to feel successful
	2B	I need relationships and good feelings to feel successful
	3A	I speak with gestures and facial expressions as well as voice intonation
	3B	I speak with few gestures and with a calm, even manner
	4A	I am less interested in and accept others feelings and concerns
	4B	I am more interested in and accept others feelings and concerns
	5A	I respond to risk and to change more cautiously
	5B	I respond to risk and change less cautiously
	6A	I usually do not share my feelings and thoughts with others easily
	6B	I usually share my feelings and thoughts with others easily
	7A	I like seeking new experiences and relationships
	7B	I like growing in familiar experiences and relationships
	8A	I am responsive to my agenda
	8B	I am responsive to the agenda of others
	9A	Conflict should be handled in a steady and cautious manner
	9B	Conflict should be handled in a prompt, efficient manner

Score	Key	Question
	10A	I like getting to know people right away and establishing good working relationships with them right away
	10B	I am more guarded in getting to know people and prefer relationships to be built slowly over time
	11A	I like to work in a very unhurried and deliberate manner
	11B	I like to work in a quick and spontaneous manner
	12A	I am flexible with how others use my time
	12B	I am not flexible with how others use my time
	13A	I usually am the first to introduce myself in social situations
	13B	I usually am not the first to introduce myself in social situations
	14A	In conversations with others, I tend to focus on building rapport with them before moving to the subject at hand
	14B	In conversation with others, I tend to move straight to the subject at hand
	15A	I am less assertive and prefer a slow pace in conversation
	15B	I am more assertive and prefer conversations to move quickly
	16A	I need strong relationship and good feelings before I can make decisions
	16B	I need good evidence and facts to support my decisions
	17A	I enjoy being involved in group dialogue and will be an active participant in conversation
	17B	I enjoy listening to group dialogue and will be a more passive participant in conversation
	18A	My work style prefers to work with others to accomplish activities
	18B	My work style prefers to work independently to accomplish activities

Please transfer your scores from the assessment to this scoring sheet

Extrovert/Introvert Axis

1A _____	1B _____
3A _____	3B _____
5B _____	5A _____
7A _____	7B _____
9B _____	9A _____
11B _____	11A _____
13A _____	13B _____
15B _____	15A _____
17A _____	17B _____

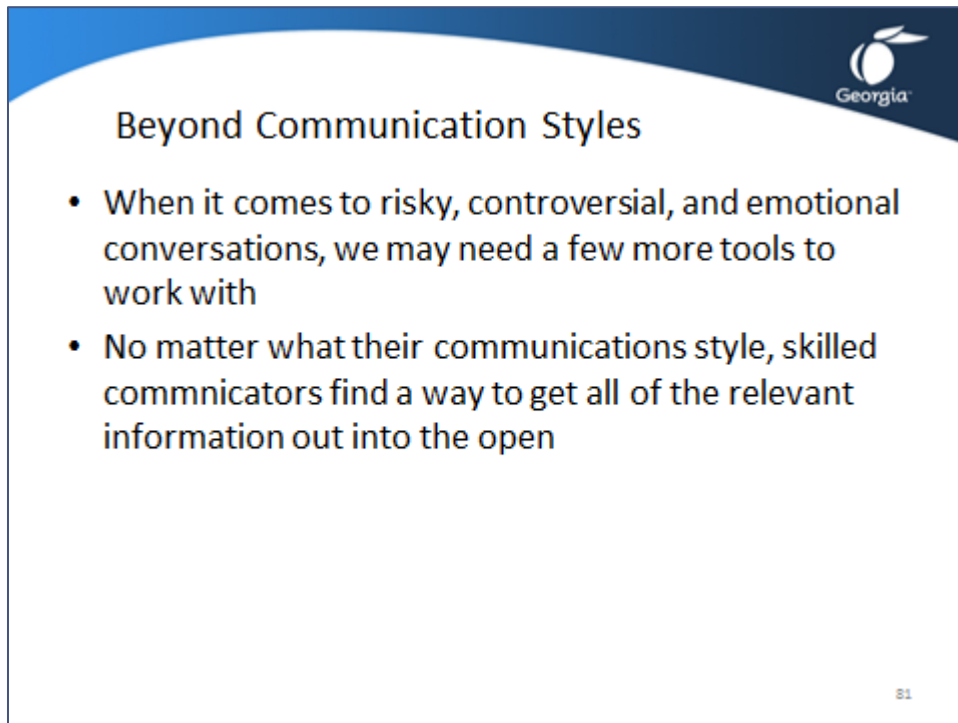
Extrovert Score: _____ Introvert Score: _____ Your primary style will be the higher number

People/Task Axis

2B _____	2A _____
4B _____	4A _____
6B _____	6A _____
8B _____	8A _____
10A _____	10B _____
12A _____	12B _____
14A _____	14B _____
16A _____	16B _____
18A _____	18B _____

People Score: _____ Task Score: _____ Your primary style will be the higher number

Topic 3: Communication Styles – Beyond Communication Styles



Beyond Communication Styles

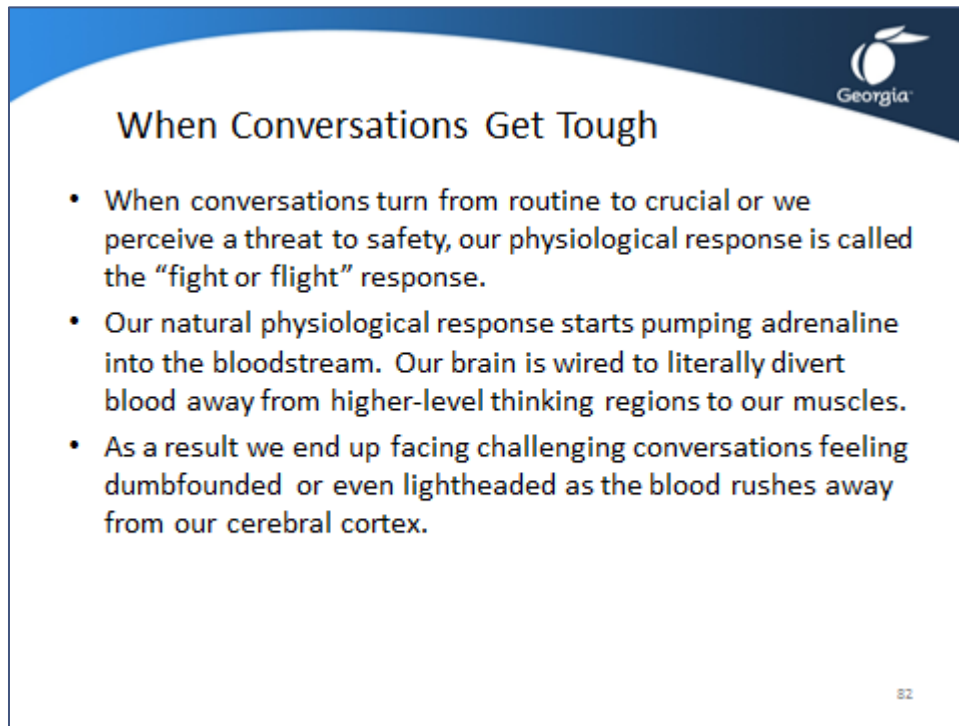
- When it comes to risky, controversial, and emotional conversations, we may need a few more tools to work with
- No matter what their communications style, skilled communicators find a way to get all of the relevant information out into the open

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“At the core of every successful conversation lies the free flow of relevant information. People openly and honestly express their opinions, share their feelings, and articulate their theories.”

- Crucial Conversations: Tools for talking when stakes are high by Kerry Paterson, Joseph Grenny, Ron McMillan and Al Switzler., (McGraw Hill, 2002, p. 20)

Topic 3: When Conversations Get Tough



When Conversations Get Tough

- When conversations turn from routine to crucial or we perceive a threat to safety, our physiological response is called the “fight or flight” response.
- Our natural physiological response starts pumping adrenaline into the bloodstream. Our brain is wired to literally divert blood away from higher-level thinking regions to our muscles.
- As a result we end up facing challenging conversations feeling dumbfounded or even lightheaded as the blood rushes away from our cerebral cortex.

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What is the fight or flight response?

The fight or flight response is our body’s primitive, automatic, physiologic, inborn response that prepares the body to fight or flee from perceived attack, harm, or threat to our survival.

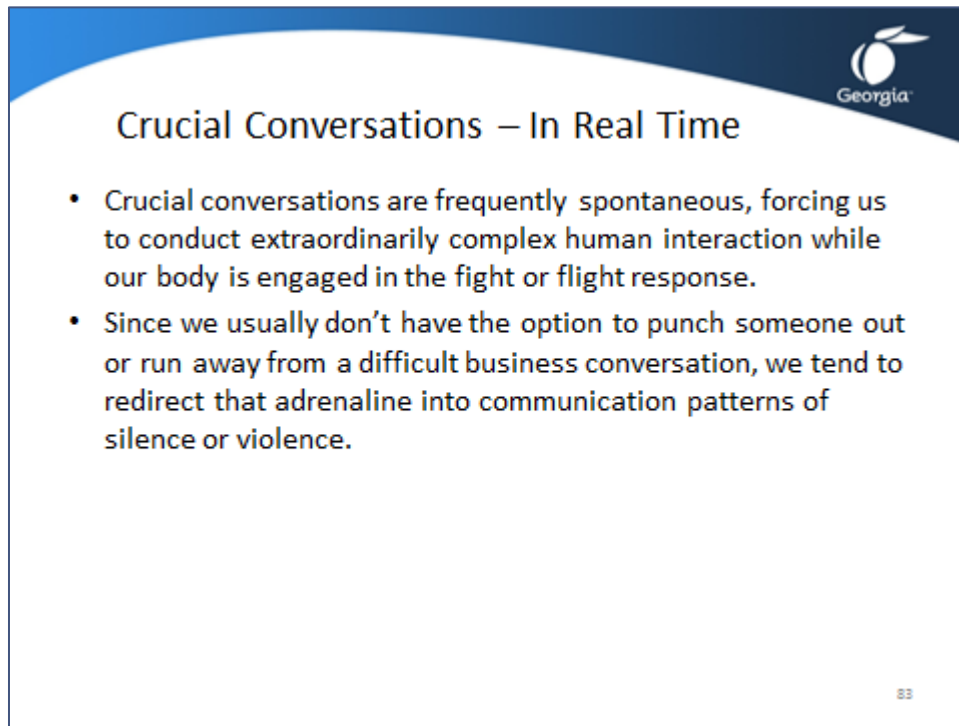
What happens to us when we feel stress?

Originally discovered by the great Harvard physiologist Walter Cannon, the fight or flight response is hard-wired into our brains and represents a genetic wisdom designed to protect us from bodily harm. This response actually corresponds to an area of our brain called hypothalamus, which – when stimulated – initiates a sequence of nerve cell firing and chemical release that prepares our body for running or fighting.

What are the signs that our fight or flight response has been activated?

When our fight or flight response is activated, sequences of nerve cells start firing causing our body to undergo a series of very dramatic changes. Our respiratory rate increases. Our pupils dilate. Our awareness intensifies. Our sight sharpens. Our impulses quicken. Our perception of pain diminishes. We become prepared – physically and psychologically – for fight or flight. We scan and search our environment looking for the enemy.

Topic 3: Crucial Conversations – In Real Time



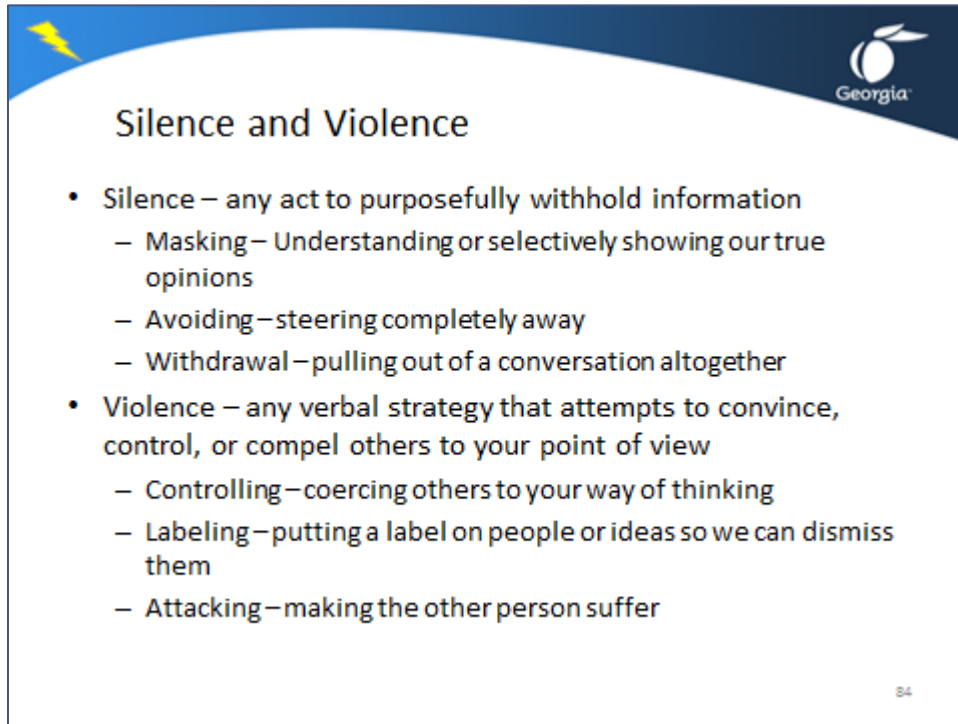
Crucial Conversations – In Real Time

- Crucial conversations are frequently spontaneous, forcing us to conduct extraordinarily complex human interaction while our body is engaged in the fight or flight response.
- Since we usually don't have the option to punch someone out or run away from a difficult business conversation, we tend to redirect that adrenaline into communication patterns of silence or violence.

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When emotions start cranking up, key brain functions start shutting down.

Topic 3: Silence and Violence



Silence and Violence

- **Silence** – any act to purposefully withhold information
 - Masking – Understanding or selectively showing our true opinions
 - Avoiding – steering completely away
 - Withdrawal – pulling out of a conversation altogether
- **Violence** – any verbal strategy that attempts to convince, control, or compel others to your point of view
 - Controlling – coercing others to your way of thinking
 - Labeling – putting a label on people or ideas so we can dismiss them
 - Attacking – making the other person suffer

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Silence

Masking may show up as sarcasm or sugarcoating.

Avoiding does not show up at all.

Withdrawing may sense that the person has shut down or they may even physically leave the room.

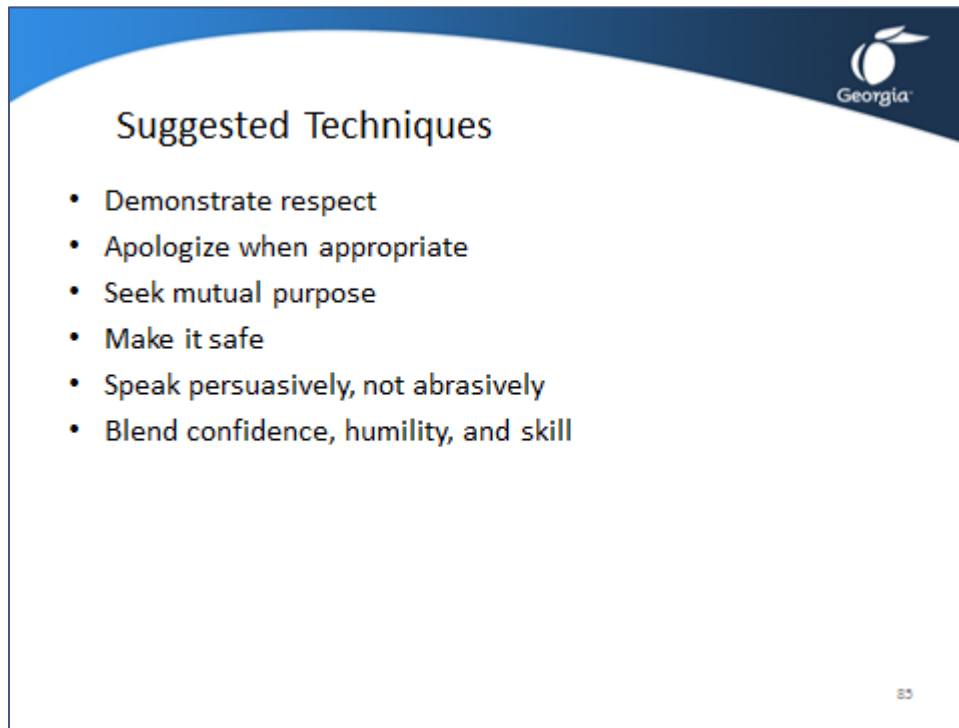
Violence

Methods of controlling include: cutting others off, overstating your facts, changing subjects.

Labeling may generalize people or things in stereotypes or categories.

Attacking tactics include belittling or threatening.

Topic 3: Suggested Techniques



Suggested Techniques

- Demonstrate respect
- Apologize when appropriate
- Seek mutual purpose
- Make it safe
- Speak persuasively, not abrasively
- Blend confidence, humility, and skill

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When others move to silence or violence, quickly assess what might be making them feel unsafe.

Do others believe you care about their goals in the conversation? Do they trust your motives? Do others believe you respect them?

People who are skilled at dialogue have the confidence to say what needs to be said to the person who needs to hear it. Those best at dialogue speak their minds completely and do it in a way that makes it safe for others to hear what they have to say and respond to it as well. They are both totally frank and completely honest.

Lesson 4 Summary: Learning Objectives Recap

- **Understand the principles of active listening**

Listening is paying attention to:

- What others say

- How they say it

- What they do when they say it

- What they do when you speak

- How they behave

Listening is an ACTIVE process

- **Understand the four different communication styles that affect communication success**

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LESSON 5: TEAM RELATIONSHIPS

Topic 1: No Lone Ranger

Topic 2: The Goal is More Important than the Role

Topic 3: Team Strength

Topic 4: Shared Values

Topic 5: Characteristics of a Functional Team

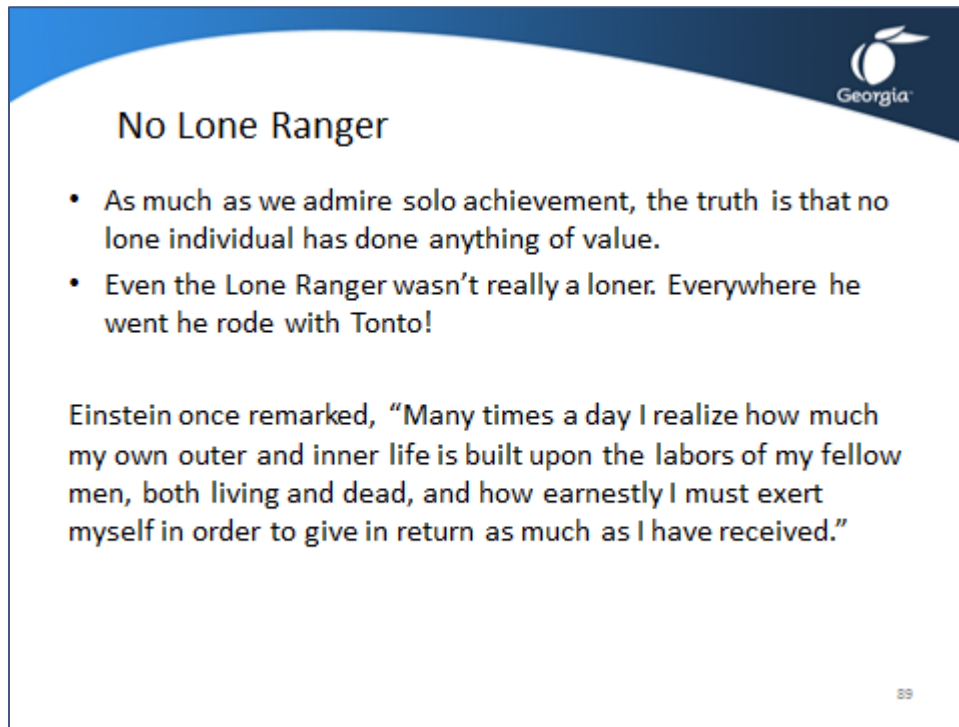
Student Learning Objectives

After completing this lesson you should be able to

- Understand the techniques of developing team relationships as a team member or team leader
- Understand how to develop a highly functioning team

Approximate Presentation time: 2 hours 30 minutes

Topic 1: No Lone Ranger



No Lone Ranger

- As much as we admire solo achievement, the truth is that no lone individual has done anything of value.
- Even the Lone Ranger wasn't really a loner. Everywhere he went he rode with Tonto!

Einstein once remarked, "Many times a day I realize how much my own outer and inner life is built upon the labors of my fellow men, both living and dead, and how earnestly I must exert myself in order to give in return as much as I have received."

88

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Teamwork is and always has been essential to building this country. A Chinese proverb states, "Behind an able man there are always other able men." Teamwork is at the heart of great achievement.

The question is not whether teams have value, but whether we acknowledge that fact and become better team players. One is too small a number to achieve greatness.

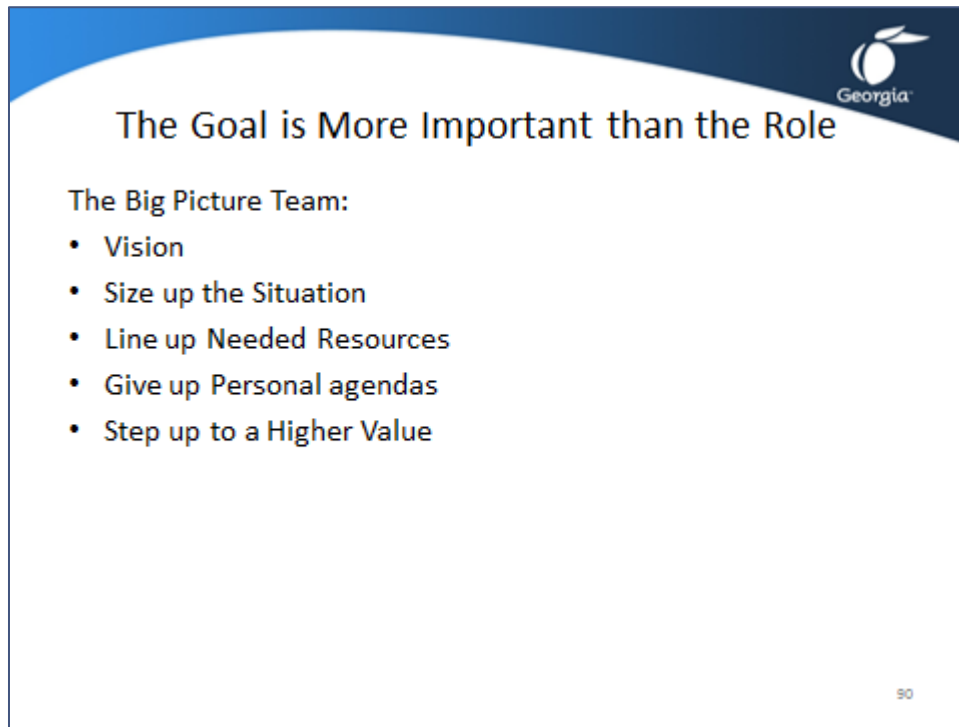
To become a better team member, consider three major goals you are working toward achieving right now. Write them down here:


- 1.
- 2.
- 3.

Reflect on how you are working toward these goals. What approach are you taking? Are you going alone? Or are you building a team to accomplish them?

To become a better team leader, think about the greatest dream you have in your life. Ask yourself, "Is it bigger than I am", "Does it benefit others as well as myself?", "Is it worth dedicating part of my life to?"

Topic 2: The Goal is More Important than the Role




Georgia

The Goal is More Important than the Role

The Big Picture Team:

- Vision
- Size up the Situation
- Line up Needed Resources
- Give up Personal agendas
- Step up to a Higher Value

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A message on a T-shirt read, “My idea of a team is a whole lot of people doing what I tell them to do.” This is the extreme of the commonly used phrase “What’s in it for me”. A team isn’t supposed to be a bunch of people being used as a tool by one individual for selfish gain.

Members of a team have mutually beneficial shared goals, are motivated to work together, and are not manipulated by someone for individual glory.

Bud Wilkinson, acclaimed 1950’s coach at Oklahoma said, “If a team is to reach its potential, each player must be willing to subordinate his personal goals to the good of the team.”

Building a Big Picture Team


- **Vision:** The team needs to have a goal. If everyone in a group embraces the vision for achieving the big picture, then the people have the potential to become an effective team.
- **Size up the Situation:** seeing the gulf between what is and what could be is often intimidating. Team builders see this as an opportunity to put the right people together to achieve the vision.
- **Line up Needed Resources:** Resources are the ammunition to help you reach the goal. You cannot make progress without the support of the appropriate resources. The better resourced the team is, the fewer distractions the players will have as they try to reach the goal.

- Give up Personal agendas: Teams that win ask themselves, “What’s best for the rest?” They set aside their personal agendas for the good of the team. Ray Kroc, founder of McDonald’s once said, “No one of us is better than the rest of us.”
- Step up to a Higher Value: Only when players come together and give up their own agendas can a team move to a higher level. Unfortunately some people prefer to cling to agendas and pursue the paths of their own inflated egos instead of letting go of them to achieve something greater than themselves.

To become a better team member, ask yourself, “What goal in my life is bigger than I am?” “Am I currently participating in something greater than myself?” “Am I willing to take a subordinate role if necessary for the good of the team?”

To become a better team leader, begin to foster a team mind-set in others by modeling a willingness to serve the big picture rather than yourself. Then think about ways you can help your teammates to embrace the big picture.

Topic 3: Team Strength



Team Strength

Impacts of the Weak Link, stronger members:	Strengthening the Chain (No weak links!):
<ul style="list-style-type: none">• Identify the Weak One• Have to Help the Weak One• Come to Resent the Weak One• Become Less Effective• Question the Leader's Ability	<ul style="list-style-type: none">• Strengthen people through training• Develop teamwork• Select the right people

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The strength of the team is impacted by its weakest link. You cannot avoid dealing with weak links. Team members who don't carry their own weight slow down the team, and they have a negative effect on your leadership.

Impacts of the weak link:

- The Stronger Members Identify the Weak One: the weak link can't hide.
- The Stronger Members Have to Help the Weak One.
- The Stronger Members Come to Resent the Weak One.
- The Stronger Members Become Less Effective.
- The Stronger Members Question the Leader's Ability

Strengthening the Chain (No weak links!):

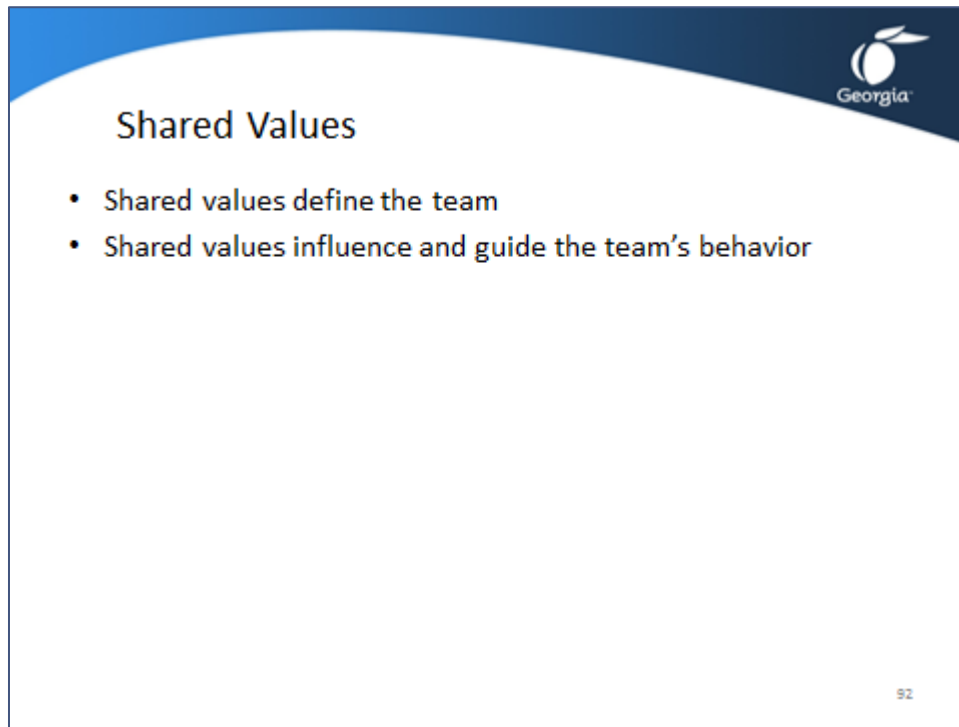
- Strengthen people through training
- Develop teamwork
- Select the right people

To become a better team member, examine whether you may be hindering your team. Review the items below.

- Have trouble keeping pace with the other team members
- Am not growing in my area of responsibility
- Have a hard time seeing the big picture
- Have difficulty seeing my personal weaknesses
- Have a tough time working with the rest of the team
- Consistently fail to fulfill expectations in area of responsibility

To become a better team leader, you cannot ignore the issues created by a weak link. Different solutions are appropriate. If training has been offered without success, a “trade” may be in order, or you may want to place the person on the sidelines for a while. No matter what kind of situation you face, remember that your responsibilities to people come in the following order: to the organization, to the team, and then to the individual. Your own interests come last.

Topic 4: Shared Values



The slide features a blue header with a white curved shape on the left and a dark blue curved shape on the right containing the Georgia logo. The main content area is white with a thin black border. The title 'Shared Values' is centered at the top. Below it are two bullet points. The number '92' is in the bottom right corner.

Shared Values

- Shared values define the team
- Shared values influence and guide the team's behavior

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Shared values define the team. Just as personal values influence and guide an individual's behavior, organizational values influence and guide the team's behavior.

If everyone embraces the same values, team members can still have a connection to one another and to the larger team.

Shared Values are like...

- **Glue:** they hold people together, forming lasting bonds
- **A Foundation:** providing stability for growth; something to build on
- **A Ruler:** helping to set a standard for the team's performance
- **A Compass:** keeps the team moving in the right direction making good decisions even through stormy times
- **A Magnet:** a team's values can attract others with similar values
- **An Identity:** Values define the team and give it a unique identity. What you believe identifies who you are.

An acronym that describes PARTNER:

As your partner, we promise to...

Put your needs first in every situation

Add value to your personal leadership

Recognize we serve a common goal

Tailor our services to meet your need

Never take for granted the trust placed in us

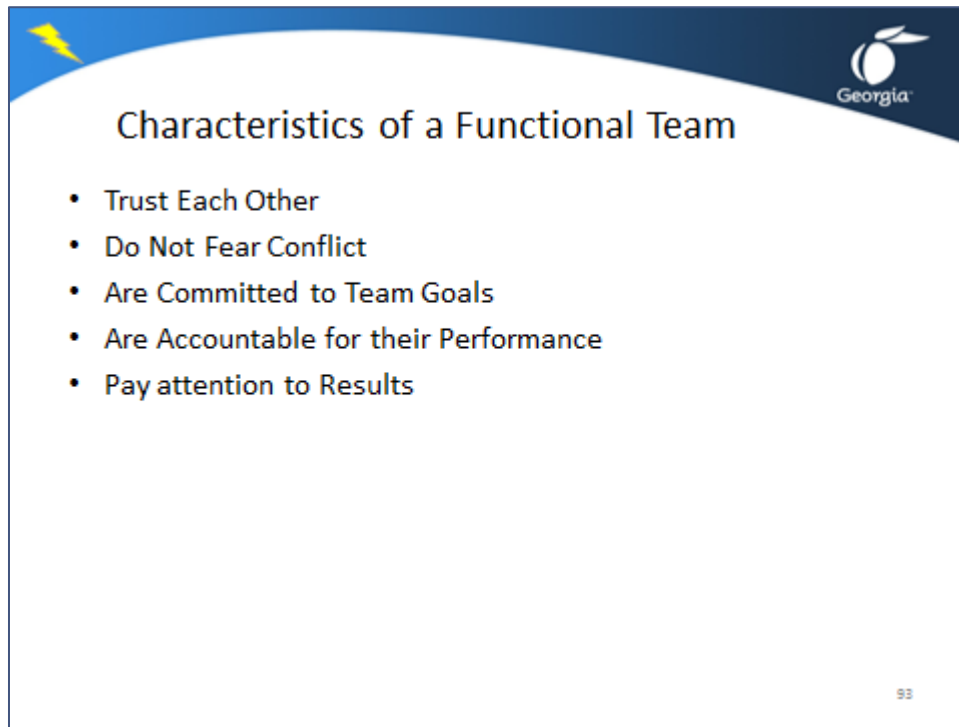
Embody excellence in everything we do

Respect everyone's uniqueness

To become a better team member, make sure you know your team's values, examine yours in comparison to them, and commit yourself to align to the team's values.

To become a better team leader, know the values the team should embrace, live the values, communicate the values to the team, and obtain buy-in through aligned behavior among teammates.

Topic 5: Characteristics of a Functional Team



Characteristics of a Functional Team

- Trust Each Other
- Do Not Fear Conflict
- Are Committed to Team Goals
- Are Accountable for their Performance
- Pay attention to Results

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The founder of a multi-billion dollar company expressed the power of teamwork when he stated, “If you could get all the people in an organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time.” Most would agree with this statement while also understanding the seeming impossibility of making it happen.

The fact remains that teams, because they are made up of imperfect human beings, are inherently dysfunctional. Teamwork comes down to mastering a set of behaviors that are at once uncomplicated, but extremely difficult to put into practice day after day.

This section will provide five principles to improve your team.

1. Trust Each Other

Trust lies at the heart of a functioning, cohesive team. Trust is the confidence among team members that their peers’ intentions are good, and that there is no reason to be protective or careful around the group. Teammates must get comfortable being vulnerable with one another. The team leader must take action to encourage the building of trust on a team by demonstrating their vulnerability first.

2. Do Not Fear Conflict

All great relationships require productive conflict in order to grow. It is important to distinguish productive ideological conflict from destructive fighting and interpersonal politics. Ideological conflict is limited to concepts and ideas, and avoids personality-focused, mean-spirited attacks. The team leader should demonstrate restraint when their people engage in conflict, and allow resolution to occur naturally. This does not mean you have lost control.

3. Are Committed to Team Goals

Commitment is a function of two things: clarity and buy-in. Remember that conflict underlies the willingness to commit without perfect information. Only when everyone has put their opinions and perspectives on the table can the team confidently commit to a decision. The team leader cannot put too high a premium on certainty or consensus.

4. Are Accountable for their Performance

Accountability refers specifically to the willingness of team members to call their peers on performance or behaviors that might hurt the team. Members of great teams improve their relationships by holding one another accountable, thus demonstrating that they respect each other and have high expectations for one another's performance. There is nothing like the fear of letting down respected teammates that motivates people to improve their performance. The team leader should encourage and allow the team to serve as the first and primary accountability mechanism and act as arbiter of discipline when the team itself fails.

5. Pay attention to Results

An unrelenting focus on specific objectives and clearly defined outcomes is a requirement for any team that judges itself on performance. Every good organization specifies what it plans to achieve in a given reporting period. The team leader must set the tone. If team members sense that the leader values anything other than results, they will take that as permission to do the same for themselves.

Ironically, teams succeed because they are exceedingly human. By acknowledging the imperfections of their humanity, members of functional teams overcome the natural tendencies that make trust, conflict, commitment, accountability, and a focus on results so elusive.

Exercise 5.1: Team Assessment

Instructions:

Use the scale below to indicate how each statement applies to your team. It is important to evaluate the statements honestly and without over-thinking your answers.

3 = Usually

2 = Sometimes

1 = Rarely

- _____ 1. Team members are passionate and unguarded in their discussion of issues.
- _____ 2. Team members call out one another's deficiencies or unproductive behavior.
- _____ 3. Team members know what their peers are working on and how they contribute to the collective good of the team.
- _____ 4. Team members quickly and genuinely apologize to one another when they say or do something inappropriate or possibly damaging to the team.
- _____ 5. Team members willingly make sacrifices (such as budget, turf, head count) in their departments or areas of expertise for the good of the team.
- _____ 6. Team members openly admit their weaknesses and mistakes.
- _____ 7. Team meetings are compelling, and not boring.
- _____ 8. Team members leave meetings confident that their peers are completely committed to the decisions that were agreed on, even if there was initial disagreement.
- _____ 9. Morale is significantly affected by the failure to achieve team goals.
- _____ 10. During team meetings, the most important – and difficult – issues are put on the table to be resolved.
- _____ 11. Team members are deeply concerned about the prospect of letting down their peers.
- _____ 12. Team members know about one another's personal lives and are comfortable discussing them.
- _____ 13. Team members end discussions with clear and specific resolutions and calls to action.
- _____ 14. Team members challenge one another about their plans and approaches.
- _____ 15. Team members are slow to seek credit for their own contributions, but quick to point out those of others.

Scoring:

Combine your scores for the preceding statements as indicated below.

Dysfunction 1: Absence of Trust	Dysfunction 2: Fear of Conflict	Dysfunction 3: Lack of Commitment	Dysfunction 4: Avoidance of Accountability	Dysfunction 5: Inattention to Results
Statement 4:	Statement 1:	Statement 3:	Statement 2:	Statement 5:
Statement 6:	Statement 7:	Statement 8:	Statement 11:	Statement 9:
Statement 12:	Statement 10:	Statement 14:	Statement 14:	Statement 15:
Total:	Total:	Total:	Total:	Total:

A score of 8 or 9 is a probable indication that the dysfunction is not a problem for you team.

A score of 6 or 7 indicates that the dysfunction could be a problem.

A score of 3 to 5 is probably an indication that the dysfunction needs to be addressed.

Lesson 5 Summary: Learning Objectives Recap

- **Understand the techniques of developing team relationships as a team member or team leader**

The truth is that no lone individual has done anything of value

Members of a team have mutually beneficial shared goals

The strength of the team is impacted by its weakest link

Shared values define the team

- **Understand how to develop a highly functioning team**

Trust Each Other

Do Not Fear Conflict

Are Committed to Team Goals

Are Accountable for their Performance

Pay attention to Results

APPENDIX I - EXERCISE ANSWERS

Exercise 3.1: Strawman

Instructions:

Read the scenario below and complete the Strawman Decision Proposal.

- The order entry manager and the IT development manager have been arguing over how the decision on a new order entry system should be made.
- The order entry manager claims the he must have final say over the software choice, since it will impact his workload and daily quality of life for years to come.
- The IT development manager claims she must make the final decision, since she must be capable of installing and supporting the software.

Strawman Decision Proposal

Decision:

How to choose and order the new order entry system

Impact/Criteria:

- Project budget
- Revenues from customer
- Time to enter orders
- Morale of order entry staff

Proposed Decision Makers and Rationale:

3. I.T. – Decides technical environment criteria
4. Manager O.E. – Decides functionality

Proposed Decision Influencers and Approach:

Customer Pilot Team – Review web capability and interface relative to their requirements

Order Entry Pilot Team – Review functionality and interface to ensure quick and easy capability relative to current system

Finance – Ensure audit trail and data integrity, sufficient detail for invoicing and customer invoice inquiry

Decision Required By: No later than xx/xx/20xx

Proposed Decision Process:

6. IT to identify packages to be examined by xx/xx/20xx
7. Final reviews and input by all influencers by xx/xx/20xx
8. IT to interface with suppliers on questions/add-ons/customization issues
9. IT and OE to use weighted scoring. Scoring to be completed by xx/xx/20xx
10. If IT and OE disagree, VPs to resolve by xx/xx/20xx. CEO will be tie-breaking vote

CASE STUDY – SPEEDY OFFICE SUPPLIES WEB EXPANSION PROJECT

Company Overview

Speedy Office Supplies has been in business for 15 years and is recognized as the leader in discount office supplies. We have a reputation of providing high quality products at reasonable prices and offering superior customer service. We are selling to corporate clients, governmental agencies, and individuals. Our customers are served by over 40,000 employees through direct sales, catalogs, e-commerce and more than 2,000 stores. Eighty percent of our business is currently done in our 2,000 retail stores.

Over the past five years the Retail Store Division has shown a steady decline in sales and profitability; energy costs have increased by 30% for our fleet vehicles and retail stores; employee health care costs have increased by 75% and continue to rise. Market trends and customer preferences are indicating that customers desire the ability to order their products on-line at times convenient to them. The SOS management team believes if we phase-out the Retail Store Division and replace it with a web-based ordering system and consolidation of our distribution network, we anticipate a savings of nearly 10 million dollars per year. This would also need to integrate into the existing supply chain systems. Customer satisfaction surveys also indicate a favorable reaction to the concept of web-based sales, which could increase our current sales by at least 25% over the next 5 years. Based on this information SOS management has made a decision to close all the brick and mortar stores within 18 months. We believe this decision will significantly cut costs and that we can be just as successful selling our products on our website.

Currently orders for products are received via in-store requests, phone calls, or catalog mail-in from customers. We access our online system to check inventory, prices, and estimated shipping dates. If the order total is over \$100,000 we turn it over to a supervisor. We then call the Credit Card Authorization Company to check the customer's credit card account. If the credit card charge is authorized we enter the order into the system. The current system is an old mainframe application and is very cumbersome.

There are purchasing agreements, special discounts, and payment terms for our clients purchasing over \$50,000 per year. In the past, we have billed these customers on a monthly basis, providing them with a detailed listing by location of their purchases. We want to make it easier for them to pay via credit card each time they place an order to increase our cash flow and lower our Accounts Receivable. If possible, we still want to provide select customers the same reporting on a monthly basis for their purchases by location.

Federal Express and UPS are currently bidding on the exclusive rights for delivery of all customer office supplies. Each company is proposing an online interface to track shipments,

including the name of the person who signs for the delivery. The shipment will need to have a label and detailed purchase order slip with the package. The cost of shipping is determined by the size of the package, weight, location, insurance, and timeliness of delivery. The customer will need an accurate shipping cost at the time of purchase.

Project Request

Our main focus for this project is to create the shopping experience for our retail customer on the website and to place product orders on the Internet. We want to have real time information regarding product description; quantities; pricing; availability; payment processing; shipping method options with associated costs; delivery date; and order tracking. All information currently available at the retail stores and in the catalogs should be available and consistent with the Internet.

It would be nice if there were a place on the Internet for the customer to build a profile and store frequently purchased items in a list to use for future purchases. This would be very beneficial for large organizations that purchase the same products frequently.

We envision using our existing customer number and allowing each customer to create a password to ensure security. Anyone could look at the products online, but only registered customers would be allowed to place orders. The web site should have search ability by several options: product item number (from the catalog), product type, color, and size.

Hopefully when a customer places an order the software would quickly calculate a shipping charge and present the order total to the customer. We would not allow orders totaling more than \$1000 to be placed on the web. The software should also email a confirmation to the customer if requested.

Departments Involved

The **Marketing Department** is responsible for customer reporting and the negotiations for preferred customer status including volume discounts. Our largest customers receive one monthly bill for all their departments' purchases and a report showing the detailed purchases. Additionally, marketing maintains the customer profiles, which are used to process orders, verify billing information, discounts, and reduce redundancy by eliminating the need for the customer to always enter their company information.

The **Customer Service Department** will need access to all information regarding customer orders to assist with the web site usage and handle any possible complaints.

Accounts Receivable is responsible for processing and sending bills to our preferred customers. The web ordering system will need to notify accounts receivable when one of our preferred customers request their order to be direct billed. Some customers have negotiated payment terms and discount rates based on volumes. They work with the Collections Department for any outstanding receivables beyond 90 days. On a monthly basis Accounts Receivable produces an aging report.

Inventory Management is impacted by a reduction in inventory from placed orders and an increase in inventory from cancellations and returns. They are responsible for managing the inventory and placing orders with vendors. Inventory Management is also responsible for handling returns, including items that have to be returned to the suppliers as defective.

Order Fulfillment receives an order notification from the order processing system containing all necessary information required to assemble the order. They are responsible for producing the packaging slips, retrieving the supplies, assembling the order into a bin or crate, and delivering the order to the Shipping Department.

The **Shipping Department** receives the order from the Order Fulfillment department and prepares the order for shipment. The packing slip contains the shipping method requested by the customer and the estimated shipping timeframe. The Shipping Department is responsible for notifying the shipping company and updating the order status.

Outside Organizations

The **Shipping Company** currently has an online tracking system. Our web ordering system will have a direct link to the shipping company's web site for the customer to track packages using the tracking number provided by the Shipping Department to the order status system.

The **Credit Card Processor** currently authorizes customer purchases made in the stores, over the phone, or via fax. An additional interface will need to be established between the web application to receive the customer and order information and to return an authorization code.