



# CUNA Project Management eSchool

## *Leading Your Project Team*

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We use data and a scientific approach  
to talent optimization to help  
individuals, teams, and organizations  
**achieve more.**

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## Session 5

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### Leading Your Project Team

While your personal project management skills are important, being able to conduct effective meetings and lead your project team members is also critical to your success. This session will provide you with helpful tips for creating positive team dynamics and leading effective meetings to set your team up for success. We will also provide you with tips and resources to continue advancing your project management knowledge and skills.

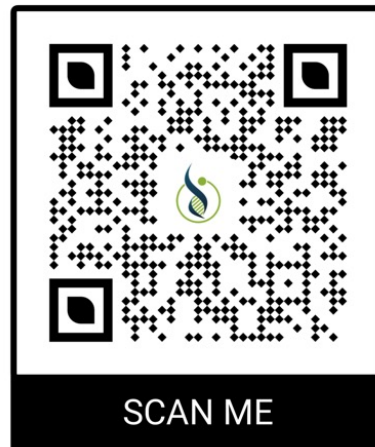


# Session Logistics



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# Quick Review!

# Keeping your project on track through effective project communications



Define channels and frequency of project communication on front end in charter



Schedule regular project meetings/check ins in advance- use “huddles” where appropriate



Agree on the set of tools everyone will use for managing the project, i.e. agendas, meeting minutes, weekly project update reports, etc.



Make it easy i.e. set up project address group, schedule/send calendar reminders when information is needed, etc.



Define who is responsible for project communication and tracking



Create project information hub to house all project-related documents- use good document management practices



Create a communication plan for the project –this can be helpful when project involves clients



# Sample Project Scenario: Moneymaker Credit Union

Defining Project  
Communication Needs



**Communication Plan Template**

Target Audience (Stakeholder or Stakeholder Group(s))	Content/Key Messages to Deliver (what information do they need, why?)	Desired Purpose/Outcome (Awareness, Understanding, Buy In, Ownership, Decision-making, Other?)	Communication Method (email, intranet, meeting, presentation?)	Timing/Frequency	Sender (s)	Feedback Mechanism

# Project Close

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- Formal approval/signoff of project deliverables
- Transition the solution to support, i.e. determine maintenance/sustainability plan
- Implement post implementation communication/change management plan
- Determine measurement/tracking/reporting plan to determine if project benefits were achieved
- Celebrate with project team!
- Conduct project closure review and evaluation

# Transition to Maintenance & Support

Project: Competitive Information Portal

**Maintenance /Support Plan**

**Approval Process for Changes/Updates:**  
Assigned product owners can update product information as defined. CC: to project manager & sponsor

**Process for Identifying Updates Needed:**

- Link on intranet page for branch employees to report out of date product information
- Maintenance schedule for ongoing updates by product

**Updates Maintenance Schedule**

Content/Tool/Resource	Owner: Person accountable for updates	Maintenance Schedule/Frequency
Mortgage Product Information-rates, fees, etc.	Christine	Monthly
Checking Account Product Information	Jeannie	2x year: by Jan 15 <sup>th</sup> and July 15 <sup>th</sup>
Auto Loan Product Information	Jeff	2x month on 1 <sup>st</sup> and 15 <sup>th</sup>
Updates needed to our top competitor financial institutions?	Tracy	Annually by Jan 15 <sup>th</sup>

**Communication Process for Distributing Updated Information:**

Intranet announcement done by product owner when new/updated product information has been added

# Post implementation communication & change management plan...

What are some actions we can take to  
gain greater adoption/use of this new  
tool by branch staff?



### Current Change Self-Reflection

What is the change?

Based upon your chosen change fill in the evaluation section and assign a rating for each area on a scale of 1 (low) to 5 (high).

	Evaluation	Rating (1) low – (5) high
<b>Awareness</b>	List the reasons you believe the change is necessary:	Rate your level of awareness for the need for change:
<b>Desire</b>	List the factors or consequence (good and bad) that create a desire for you to change:	Rate your level of desire to make the change happen:
<b>Knowledge</b>	List the skills and knowledge needed for the change:	Rate your level of knowledge about the change:
<b>Ability</b>	Considering the skills and knowledge identified in the previous level, evaluate your current ability to perform these skills or act on this knowledge:	Rate your level of ability to change:
<b>Reinforcement</b>	List the reinforcements that will help to retain the change. Are incentives in place to reinforce the change and make it stick?	Rate your level of commitment to actions that will reinforce the change

The first score of 3 or less= \_\_\_\_\_

This is the **Barrier Point** and must be the first area addressed for the change to be successful.



**Post Project Review & Evaluation-Continuous Improvement**

For discussion with project team, sponsor, and key stakeholders:

What lessons were learned during this project that should be captured and applied to future projects?
What worked, what did we do well?
What didn't work, what could we have done differently?
What changes would we make if we conduct a similar project in the future?
What lessons learned could be shared with other project teams?

### SWOT Analysis: My Project Leadership



<p>Strengths: What went well? Where was I most effective in leading the project and project team?</p>	<p>Weaknesses: What might have gone better? Where was I least effective in leading the project and project team?</p>
<p>Opportunities: Where/what/how could I improve my project management or team management skills going forward? What steps will I take? What will I do differently next time?</p>	<p>Threats: What are the implications/how will this be a barrier to my success if I don't continue to build these skills and make improvements?</p>







Creating a constructive team culture



**How would you describe “team culture?”**

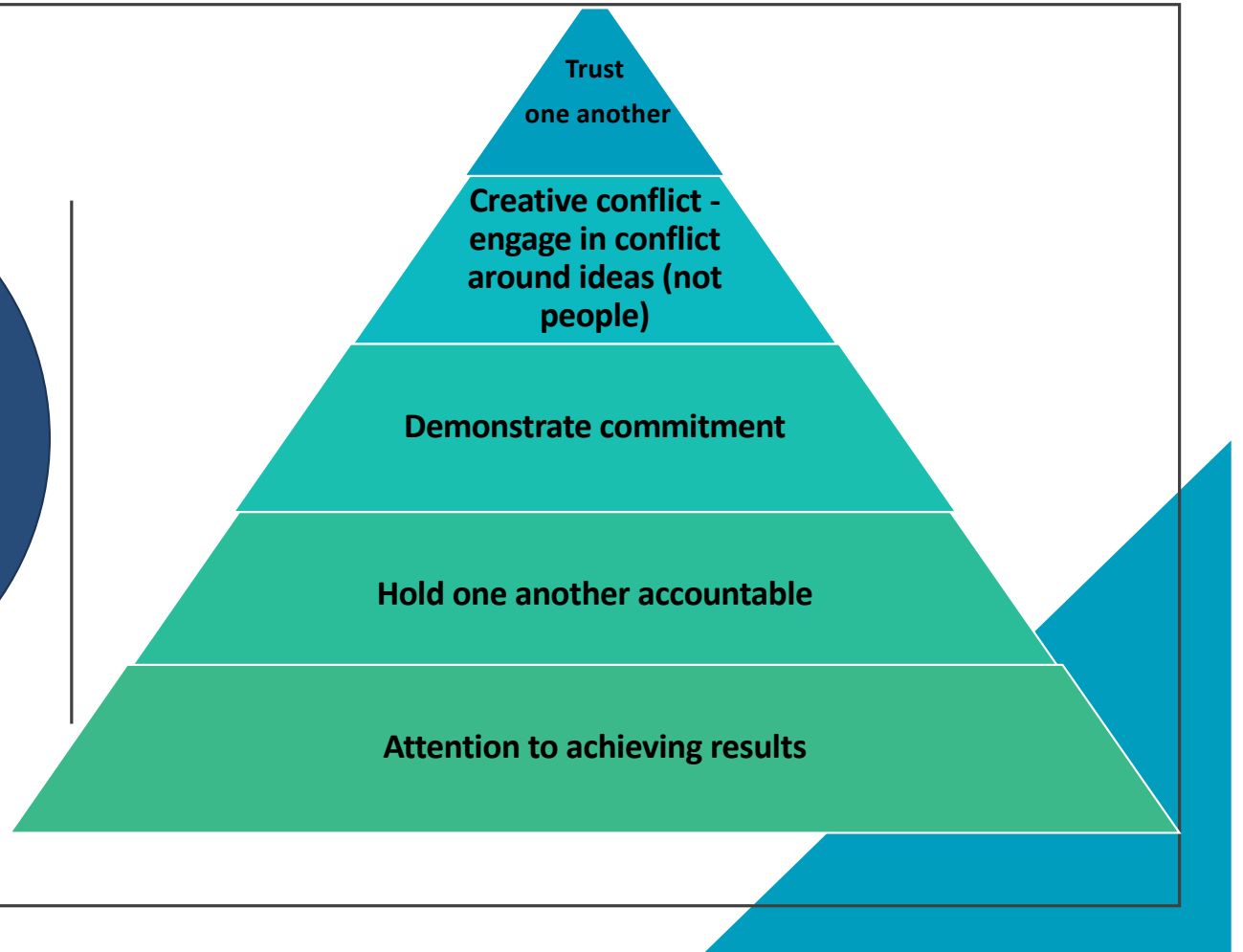
**How would you describe "team culture?"**



## Team culture is...

Shared Beliefs, Norms, and Expectations  
*Cultural elements of team dynamics that shape how team members believe they should behave, the “unspoken rules” for how things work around here*

Lencioni's Five  
Behaviors of a  
Cohesive/High  
Performance  
Team



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# I have worked on a team that has struggled with trust

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Yes

No

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**Describe how it feels to work on a team that struggles with trust- what types of behaviors do you see or feelings do you experience?**

# Teams with absence of trust.....

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- Hesitate to ask for help from each other
- Hesitate to offer help outside their own areas of responsibility.
- Hide their mistakes and weaknesses from each other
- Fail to recognize and leverage each others' skills, abilities, and experiences.
- Waste time and energy “playing it safe” and attempting to “look good, look smart”
- Withhold feedback and miss opportunities to learn and improve





# The Importance of Trust:



Think of person you have high trust with. What words would you use to describe that relationship?



Think of person who you have low trust/no trust. What words would you use to describe that relationship?



What does communication look like with each of these people?



## High Trust Relationships

- Safe
- Authentic
- Comfortable
- Have my best interests at heart
- Easy

## Low/No Trust Relationships

- Insecure
- Difficult
- Second guessing intent
- Inauthentic
- Risky

*Most of us would want to know if we were doing something incorrectly or had a career-limiting behavior we are unaware of. We would want someone we trust to tell us so we can improve. Now imagine-- how would that same feedback feel different coming from someone we have low trust or no trust with?*

# Teams who trust .....



- Readily ask for and offer help to each other
- Admit weaknesses and mistakes.
- Are open to questions and input from others
- Give one another the benefit of the doubt before arriving at a negative conclusion.
- Take risks in offering feedback—operate with authenticity
- Recognize and appreciate other skills, abilities, and experiences without feeling competitive.
- Focus time and energy on important issues, not politics.
- Offer and accept apologies without hesitation—extend grace.
- Look forward to meetings and other opportunities to work as a group.

# A Moment of Reflection:

## Team Dynamic/Culture

- *How does it feel now?*
- *How do you want it to feel?*

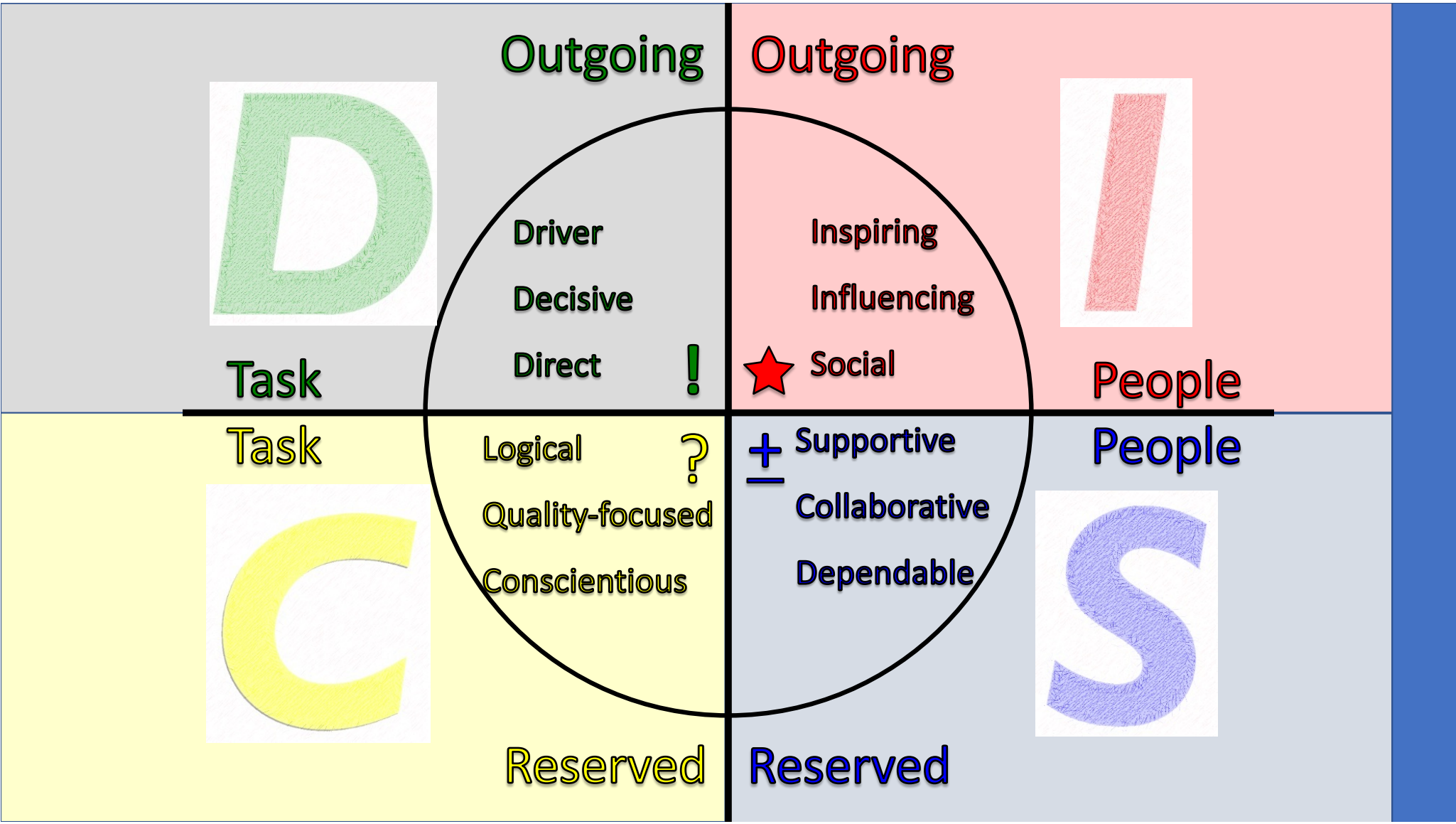
## My Relationships

- *Where are they now?*
- *Where do I want them to be?*





# Managing different personality styles



Accountability



**What types of behaviors might you see on a team that avoids accountability?**



# A team that avoids accountability.....

- Often misses deadlines and key deliverables— "not my job".
- Tends to finger point and blame when work doesn't get done
- Creates resentment among team members who have different standards of performance.
- Encourages mediocrity, doing the minimum.
- Places an undue burden on the team leader as the sole source of discipline.



# A team that holds one another accountable....



- Has clear ownership of tasks and deliverables and identifies dropped balls quickly
- Doesn't blame, instead quickly assesses the situation and has open discussion about how to get back on track
- Establishes respect among team members who are held to the same high standards.
- Ensures that poor performers feel pressure to improve.
- Leverages peers/each other to drive performance vs. full burden of performance standards set by team leader

# Building An Accountable Team



Be clear on the expectations of others roles, including boundaries and what success looks like

Task	Task Breakdown	Primary Acctblty	Target Comp Date	Status	Contingencies	Date Complt'd	Comments
<b>Project Launch</b>							
<b>Launch Meeting</b>							
	1. Introduction to project and team	Tracy	4/19/2019			4/19/2019	
	2. Determine team and meeting schedule	Tracy					
	3. Agree on end users/customers	Tracy					
	4. Outline anticipated project phases	Tracy					
<b>Needs Assessment Phase</b>							
<b>Quantitative Analysis: Focus Group Implementation</b>							
	1. Finalize survey format and questions	Jeannie	5/2/2019			5/2/2019	
	2. Draft e-mail for CEO to send with survey	Jeannie	4/22/2019				
	3. Send notification to Branch Managers	Cas	4/23/2019				
	4. Summarize survey results	Cas	4/24/2019				
		Jeannie	5/2/2019				
<b>Qualitative Analysis: Focus Group Implementation</b>							
	1. Determine sample size and gain approval on plan	Jeannie	5/23/2019			5/16/2019	
	2. Determine roles and timeframes	Kimberly	5/5/2019				
	3. Schedule rooms and participatns	Kimberly	5/10/2019				
	4. Send notification to Branch Managers	Tom	5/15/2019				
	5. Summarize focus group data	Kimberly	5/23/2019				
<b>Identify Additional Credit Union Sources of Competitive Data</b>							
		Cas	5/23/2019			5/23/2019	
<b>Design Phase</b>							
<b>Creat Mock Up of Data Matrix</b>							
	1. Identify financials to include based on survey/focus groups	Tom	5/30/2019				
	2. Identify products to include based on survey/focus groups	Cas	5/5/2019				
	3. Creat matrix chart and include proposed details for each product and proposed update schedule	Kris/Darrell	5/15/2019				
	4. Assign data ownership for research phase	Tracy	5/20/2019				
	5. Get approval from project sponsor on proposed plan	Tracy	5/30/2019				
<b>Design Technology: Formatting and Access</b>							
	1. Mock up design template for each product	ie	6/30/2019			6/27/2019	
			6/1/2019				

Holding team members accountable often means having difficult conversations...







# Planting the Seed

## Asking permission to have the conversation

- *Example: "I have something important I'd like to talk with you about. Is now a good time?"*

What happens when we hear these words?...

Uh Oh.....!!!!!! Here it comes!

# Common reactions to receiving difficult feedback are...

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# Common Reactions to Receiving Difficult Feedback

- Hurt
- Denial
- Defensiveness and justification for our actions
- Attacking the messenger
- Explanations or rationalizations
- Criticizing the manner of feedback delivery

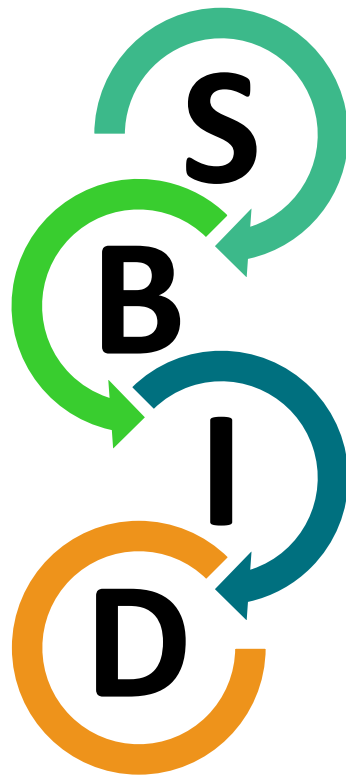
## Common Mistakes When Delivering Difficult Feedback



- The feedback judges the individual person vs. their actions
- The feedback “psychoanalyzes” the motives behind behavior
- The feedback is too vague and unspecific to know what to do with it
- Negative feedback gets “sugarcoated” and the real message is lost or unclear
- The feedback is exaggerated with generalities.

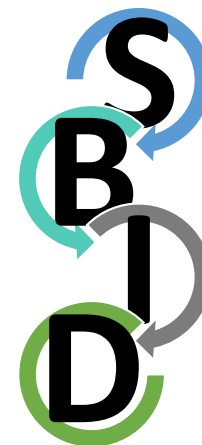
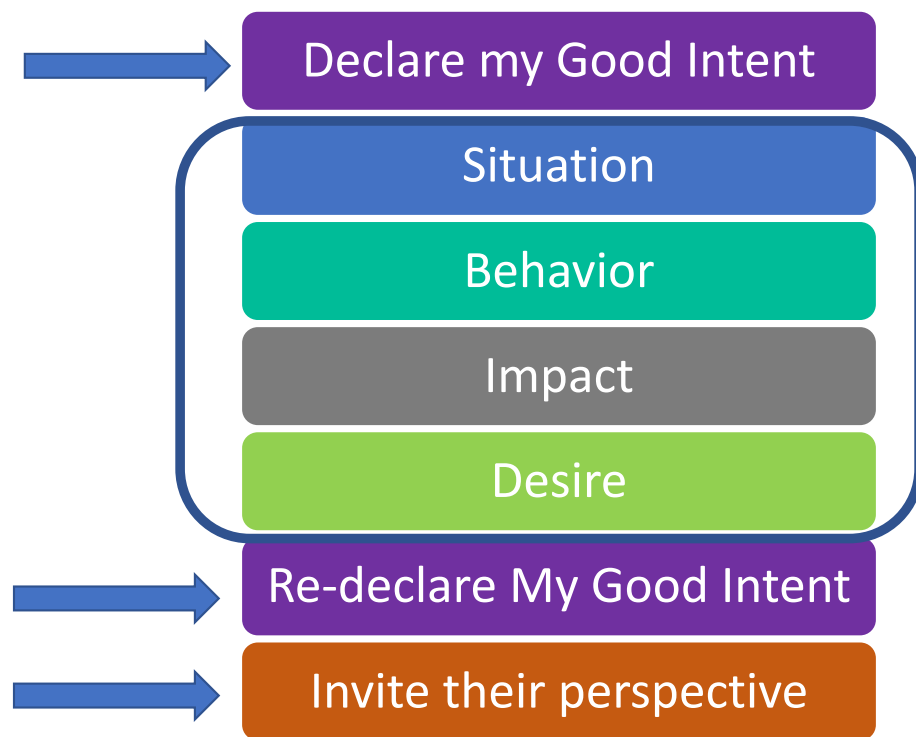


# Having a Difficult Conversation – Behavioral



Situation  
Behavior  
Impact  
Desire

# SBID +



### Begin with an opening high-level purpose and intent statement

- “I’d like to talk with you about our project team meetings so we can make sure they are as effective as possible (or get on the same page, come to agreement on next steps, figure out the best way forward, etc.) My intent is to ensure we are working together as effectively as possible and getting all possible great ideas on the table.”

### Describe the situation using facts (vs your interpretations)

- “As you know, our project team has weekly meetings and we invite all the stakeholders so we can gather input from all the areas involved.”

### Describe the behavior or issue

- “I’ve noticed it seems like you had your phone out during the last meeting, and we didn’t hear your input on the project.”

### State the impact/consequences

- “It is an important project so I worry we may miss something if we don’t get your thoughts as we move forward.”

### State what you want to see more of expressing confidence in them (vs focusing only on what you want the person to stop)

- “I know you have some great experience and valuable input, so I feel you have a lot to offer this team. I’d love to see you participate with us and contribute your ideas when we discuss options and make decisions during each meeting.”

### Restate overall intent

- “Again, I just want to reiterate that my intent is to make sure we’re working together as effectively as possible and getting all perspectives on the table to ensure we’re considering everyone’s needs.”

### Invite their perspective, ask questions

- “I’d love to hear your thoughts on this.”

**TEMPLATE: Planning What to Say to Address a Difficult Conversation-Behavioral Issue**

Begin with an opening high-level purpose and intent statement

Describe the situation using facts (vs your interpretations)

Describe the behavior or issue




State the impact/consequences

State what you want to see more of expressing confidence in them (vs focusing only on what you want the person to stop)


Restate overall intent

Invite their perspective, ask questions






**One learning takeaway, tip, or tool I found valuable from today's session...**



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Tidbits and  
Takeaways!

Project  
Management  
Trivia!



## Additional learning to advance your project management skills...

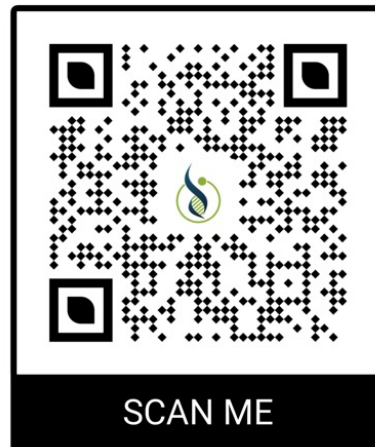
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- Fundamentals of Project Management, by Joseph Heagney
- Managing Projects Large and Small: The Fundamental Skills to Deliver on Budget and on Time, Harvard Business Essentials
- Project Management for The Unofficial Project Manager, Franklin Covey/Kory Kogon



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