THE PROJECT LEADER

# THE PROJECT WORKBOOK

Your guide to applying the four principles of project leadership.

# The Principles

The four principles of project leadership recognize that people are at the center of every project. Through people, we achieve project results. The method outlined below represents the key elements you will need to lead your team to achieve your goal(s). The elements include charting the course, establishing a shared vision, navigating the obstacles, and focusing on the goal.

## Chart the Course

Create and socialize a project charter to align your team and key stakeholders with the goal. Clearly establish what is and isn't important.

## Establish a Shared Vision

Help your team establish a shared vision by breaking down the project goal into bite-sized deliverables and activities. Help team members see how their role fits into the overall project.

## Navigate the Obstacles

Embrace the team's confidence while also creating navigation plans that proactively overcome potential obstacles.

## Focus on the Goal

Minimize distractions using a focus plan and empower the team to make decisions. Create safety and security for the team with emphasis on continuous learning and adapting.

When combining each of these elements, you will have a team that clearly understands the goal you are collectively pursuing. Each team member will know how she fits into the project team and how she can contribute her talents toward achieving the goal. Together, you and your team will proactively identify and overcome roadblocks along the way. Finally, by applying project leadership principles, you will help the team maintain focus on achieving the goal.

## Getting Started

Now that you have been introduced to these principles, you are ready to begin learning how to apply them to your projects. The best way to learn these principles is to apply them to a real-world project that you are currently working on or want to begin. Use this section to select the right project to use throughout this learning guide.

## Definition of a Project

We begin by defining a project. A project is any endeavor pursued individually or collaboratively to achieve some specific outcome by a certain deadline. The PCPM method further defines this as a specific goal an individual or team will pursue over a defined period of time.

### Project: Definition

I further define a project as a specific goal a team will pursue over a defined period of time. There is a definite start and definite end.

## Choosing a Project

Using the second definition of a project, think about potential projects that would be good candidates for applying the project leadership principles throughout this learning guide. Your project can be personal or professional in nature.

## Projects (Example)

The following is an example list of potential projects.

| | |
|---|---|
| Moving to new home | Develop a new company website |
| Search for colleges | Implement a vnedor product |
| Plan a wedding | New benefits enrollment 20xx |
| Remodel the kitchen | A process improvement initiative |
| | Seasonal promotional campaign |

## Potential Projects

Use this section to list your projects. Include any and all projects so you have a good list from which to choose. Please use the following criteria when listing potential projects.

- The project will involve three or more people throughout the project.
- The project duration will span several weeks. Ideally, between 4 - 12+ weeks in duration.
- The project has recently started, or can begin in the near future.
- You have a good understanding of what the project needs to achieve (a.k.a. the goal).

## Projects

List your potential project ideas here.

## Select Your Project

Now select one project to use throughout this learning guide. List the project below and explain why you chose this project for learning and applying the project leadership principles.

### Selected Project

### Why this project?

# Chart the Course

This section will show you how to clarify your project goal, then socialize this with other key stakeholders to gain alignment and support.

Many project teams do not have a clear sense of the overall objective of the project they are supporting. This can be observed by asking various team members how they would describe the goal, only to have a different response from each. When not knowing the goal, project teams will hesitate, lose motivation, and make poor decisions.

To overcome this common challenge, you will **Chart the Course** by learning and applying each of these steps:

- Step 1: Clearly state your goal
- Step 2: Determine what is (and is not) in scope
- Step 3: Establish milestones and milestone dates
- Step 4: Identify key assumptions
- Step 5: Be the charter!

At the end of the section, you will have drafted a simplified project charter for your project, socialized that charter with key stakeholders for input, and finalized your charter. This step will help you establish a solid foundation from whith to build your project team and begin pursuing your project goal.

# Apply the Method

Now it's your turn! This section will walk you through, step-by-step, in how to **Chart the Course** for your project.

### Step 1: State Your Goal

You can clear up this initial confusion by clearly stating your goal for this project. The Simplified Project Charter will help you state your goal clearly, define the scope of your project, and establish milestone dates. This will help you socialize your vision with important stakeholders and members of your team.

Download the Simplified Project Charter at: www.theprojectleaderbook.com

## Explore Your Project Goal

Begin by writing about all you hope to accomplish with this project. What do you hope to have when the project is complete? What benefits will it provide for you or your organization? What problem might it solve? Create a first draft of your project goal statement below.

## Key Words or Phrases

In reviewing your first draft above, list key words and phrases that best represent your project's goal.

## Clearly State Your Goal

Now that you have written your first draft goal statement and identified the key words and phrases, you can restate your goal in a more succinct goal statement. Use the section below to rewrite your project's goal statement in 2 - 3 sentences. Be sure to use some or all of the key words and phrases you identified in the previous exercise.

The goal of this step is for you to write a clear and concise goal statement. When read by others, they will easily understand what your project will achieve. This may take several attempts to get it right. Please use the section below to write your goal statement.

### Attempt #1

### Attempt #2 (Optional)

### Attempt #3 (Optional)

### Step 2: Define Your Scope

Now that you have clarified your goal statement, define your scope. The scope of your project should outline the major deliverables you and your team need to complete in order to achieve the project goal. Deliverables can be major components of a product, software features, tangible artifacts such as documents, or major events.

At the end of this section, you should have written a short list of deliverables in scope for your project. You will also list any deliverables that may be potenttial scope or out of scope for your project.

### Brainstorm Exercise - Scope Items

Referring to your refined goal statement from the previous section, list out all of the potential project deliverables that will be needed to achieve this goal.

Good job! Now use the next section to refine your project scope, indicating what is or isn't relevant to your project goal.

## Refine Your Scope

Using the brainstormed list of project scope items on the previous page, determine which scope items are relevant to your project goal, and which scope items are not. You want your team to focus all of the effort on completing deliverables and tasks that lead to your goal, not deliverables and tasks that veer away.

Use the section below to determine which scope items will help achieve your goal, and which scope items can be deferred, delayed, or never done as they are not necessary to achieving the goal you are pursuing with your project.

## In Scope

Referring to your refined goal statement from the previous section, list only those scope items that support your project goal and add value to the quality of the project outcome needed at this time.

Remember, you want to create a list of scope items that create focus for your team. Remove items from scope that could be distractions, extend scope beyond what is truly needed, or focus on elements that could be pursued in successive projects.

Reflect again on your refined goal statement, and use the next section to remove scope items that just don't apply to your project now.

### Potential Scope

If you are not sure if a scope item is important or necessary to achieving your project goal, list it here. Items listed in this "potential scope" section can drive the agenda of near-term working sessions with stakeholders, experts, and members of your team. Together, you can determine if items in this section should be added to scope, or listed as "Out of Scope".

TIP: Identify at least one scope item that can be listed here, so that you can apply exercises used to determine if in scope or out of scope.

### Out of Scope

List scope items that do not support your project goal here. Items that typically can be listed as out of scope can be:

- A special tool or technology that is simply not necessary. A simpler approach will suffice for now.
- A scope item is defined in a way that strives for a perfect outcome, when a "good-enough" outcome will do.
- Extraneous documentation that does not add value to the project.
- Scope that encompasses a much larger group within organization or in your market, where a targeted group/market would be best to begin.

### Step 3: Establish Milestones and Milestone Dates

As you **Chart the Course** by clarifying your project goal and establishing what is and is not in scope, you will want to raise awareness about any major milestones and milestone dates that the project team will need to navigate.

**Definition:** A milestone is defined as a significant point or event in a project that the project team should be sure to achieve.

For any milestones listed, the project team will be alerted that all deliverables and tasks leading up to that milestone should be completed by the date indicated. This can introduce a healthy sense of urgency in the team to make strong progress toward the project goal.

### Milestone List

Think about the weeks and/or months between now and when you intend to complete your project. What milestone events do you and the team need to know?

| # | Milestone | Date |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Milestones you may list can range from a date the project needs to be completed, to a corporate event that is impacted by the project, or personal goal for achieving a portion of the project scope. Here are some questions to prompt your thinking.

- What date must your project be finished?
- Does any of your scope items need to be completed by a specific date?
- Is any scope item aligned with a company or other event that is already scheduled?

Refer to the real-world project example and the Simplified Project Charter template for examples of a milestone list and dates.

# Establish a Shared Vision

This section will help your team establish a shared vision by breaking down the project goal into bite-sized deliverables and activities. Help team members see how they fit into the overall project.

**Establish a Shared Vision** is all about getting your project team on board with supporting and pursuing your project goal. Many project teams do not have a clear sense of how they fit into the project. The project may require very different activities and skills then they are used to doing in their regular day jobs. The project goal may not be clear, so they don't know exactly what is needed. Even if they understand the goal, at least somewhat, the team may not be clear on what activities are needed to get there.

To overcome this common challenge, you will Establish a Shared Vision with your team by learning and applying each of these steps:

- Step 1: Convert charter to Tier 1 work breakdown
- Step 2: Conduct a work breakdown planning session
- Step 3: Organize and sequence activities
- Step 4: Assign activity owners
- Step 5: Build momentum by initiating next steps on next-up activities

At the end of the section, you will have a breakdown of the project deliverables and activities, with a sort order of priority and timing. This step will empower your team to take action now in pursuit of the project goal.

# Apply the Method

Now it's your turn! This section will walk you through, step-by-step, in how to Establish a Shared Visione for your project.

After reading the overview of Establish a Shared Vision and reading through the real-world example, it is now your turn. Read this section for instructions on how to conduct a Work Breakdown Planning Session with your project team.

**Step 1: Conduct Work Breakdown Planning Session**

This exercise is integral to the Establish a Shared Vision phase whereby your team will breakdown the work into bite-sized deliverables and activities. Download the template at the site listed below for a more detailed guide to conducting your team's Planning Session.

For our real-world project example, you will see how the goal statement and In-Scope section of the Simplified Project Charter form the first tier of the project's work breakdown.

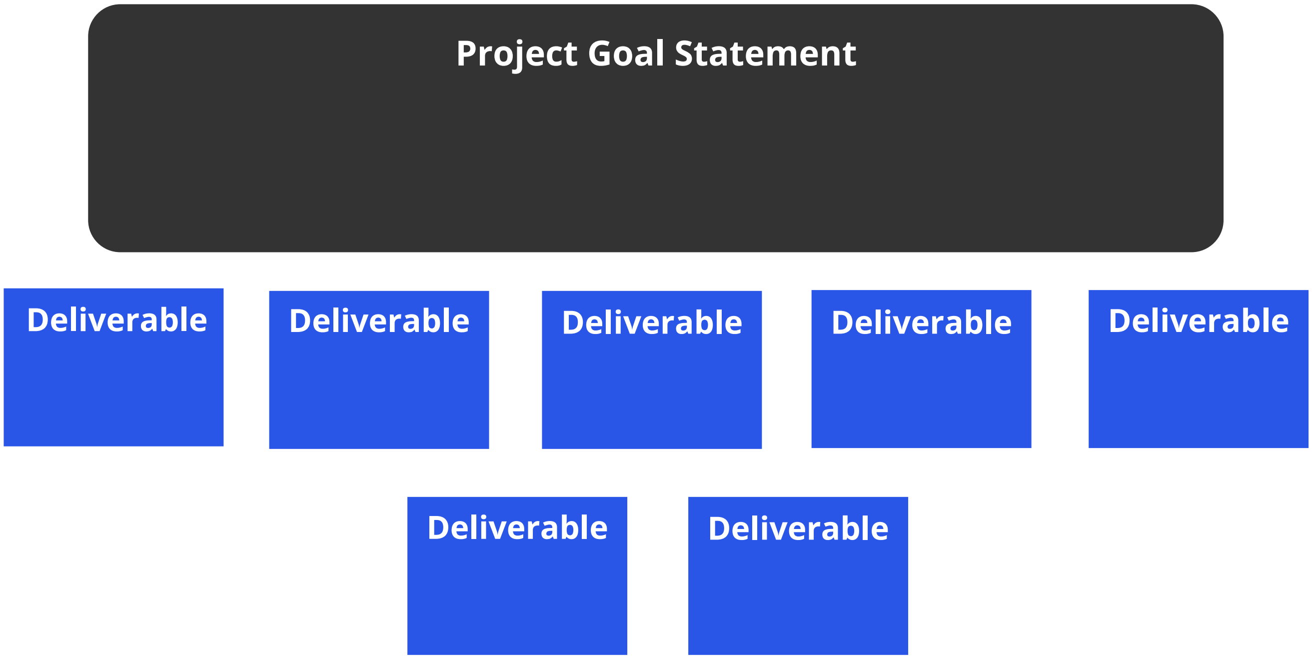
From there, the team defined major activities needed to achieve each of the In-Scope deliverables.

See next pages for more learning.


Download the **Planning Session** at: www.theprojectleaderbook.com

### Tier 1 Work Breakdown

Using the goal statement and In-Scope section of the Simplified Project Charter, represent the Tier 1 breakdown of your project goal and In-Scope deliverables




### Step 2: Conduct a Work Breakdown Planning Session

Gather your team together (virtually or in-person) for a planning session. This session usually takes 3-4 hours as your are first learning and applying this method. Over time, you may be able to conduct this in 2-3 hours for smaller, less involved projects. Ultimately, more time spent in this exercise saves you many hours and days of lost time later by removing team confusion, gathering team/expert input now, and establishing a shared understanding across your team.

**Gather these materials prior to your planning session.**

**In-Person Planning Session materials**

- Workspace with no outside distractions
- A table for people to write on
- Large-sized 6x9 Post-It notes (for posting Tier 1 items above)
- 3x3 Post-It notes of various colors (usually yellow, blue, orange, and pink)
- Sharpie magic markers (one per person)
- White board or wall with Post-It flip chart paper (for sticking post-its to large wall)

**Virtual Planning Session materials**

- Zoom, WebEx, Google Meet, or other video conference service
- Virtual white-board app such as: Miro, Mural, Microsoft Visio, Google JamBoard
- Optional - at least 2 monitor setup for you (presenter)

## Planning Session - Setting up Project room

For your planning session, set up the project room as follows

- Clear a long section of wall or whiteboard
- Tape up one flip chart page for each major deliverable from the scope section of the Simplified Project Charter.
- Write the Project Goal Statement at the top-center of the whiteboard (or on flip chart taped above the main row)
- Write each major deliverable on a 6x9 blue-colored Post-It note and post it to one deliverable per flip chart page.
- Lay out the yellow, blue, and pink 3x3 Post-Its for each team member.
- Provide a black permanent marker (medium tip) for each team member.
- Print and provide a copy of the Simplified Project Charter, one per team member.

## Orient the Team - Review the Project Charter

During the Chart the Course step, you would have socialized the charter draft with some or all of your team members. However, to ensure everyone is on the same page going into the planning session, the group will now review the charter together.

**Part 1: Review the project goal statement**
Have each team member read the project goal statement from the charter. Ask if any questions about the goal before the team gets started with the planning session. Address any questions raised by the team.

**Part 2: Review the project scope**
Have each team member read the scope section of the project. After each has read that section, show team how each In-Scope item is represented on the 6x9 blue Post-It notes on the wall. Briefly review the Out-of-Scope section and validate that while some of those items may be great ideas, for the purpose of this project and this planning session, these items are out-of-scope. No discussion or time will be spent on these items today.

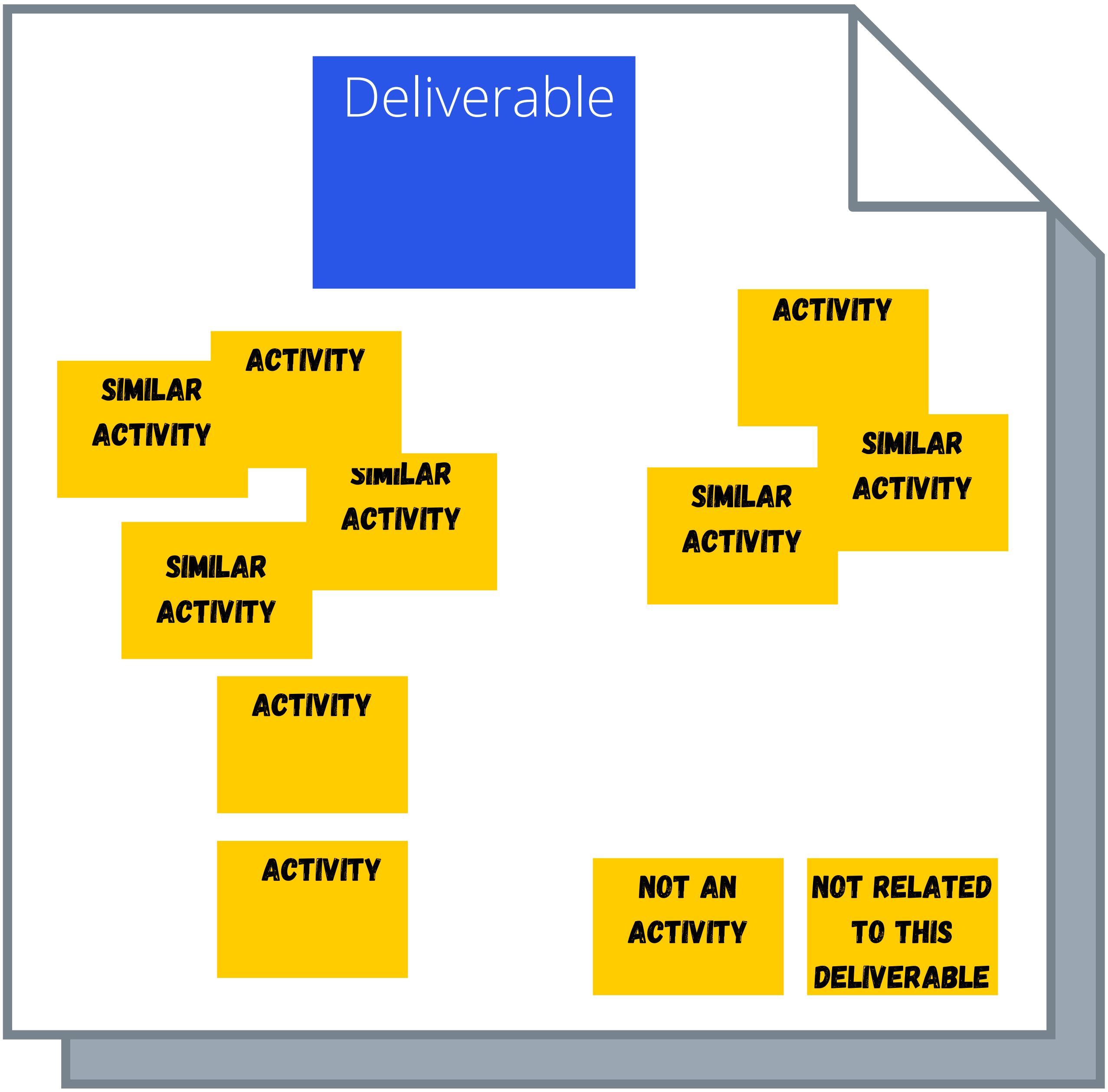
**Part 3: Review the milestones**
Briefly review the milestone list and dates so that team is aware of these as they participate in the planning session exercise.

**Part 4: Review the assumptions**
Briefly review the key assumptions section, notifying team that they can assume these assumptions are true during today's planning session exercise. If any person has concerns about one or more assumptions, simply validate their feeling and explain that another session can occur some other day to review those concerns.

**Work Breakdown for All Deliverables**

Repeat the instructions for each deliverable, focusing on one deliverable at a time.
Next instructions provided to group.

- Everyone grab a permanent marker and yellow sticky notes pad.
- For the next major deliverable from your project - we will brainstorm what activities we need to complete to achieve that deliverable.
- Ask for and address any questions the team has about the definition of the deliverable.
- Explain that the team will have 2-3 minutes to brainstorm activities.
- Check if everyone is ready, addressing any questions about the brainstorm exercise.
- Announce... "Ready... Go!"

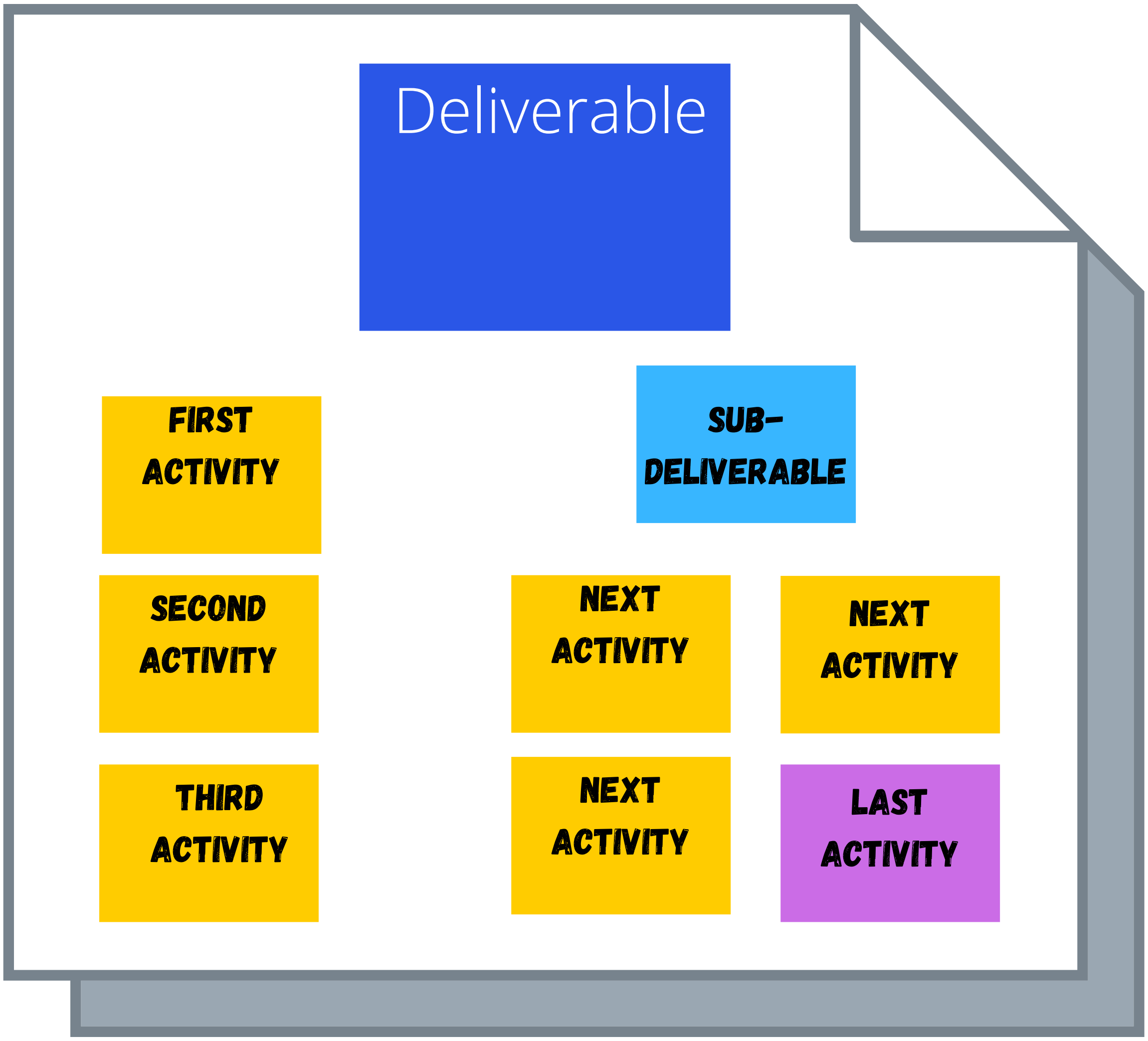


**Step 3: Organize and Sequence Activities**

As before, work with the team to rewrite the similar activities into a discreet set of activities. Then, as a team, determine in which order the activities should be completed.

To close out the work breakdown for each major deliverable, help the team apply these best practices.

- Sort activities in columns to represent activities that relate closely to each other.
- Use 3x3 blue sticky note to represent a sub-deliverable by which you can group activities.
- Identify the last activity that will be conducted that verifies deliverable is achieved.




After each deliverable is broken down into the discreet set of activities, announce that the breakdown for that activity is complete. Then, intentionally repeat the instructions for the next deliverable and start the 2-3 minute timer. This helps the team context switch between each deliverable.

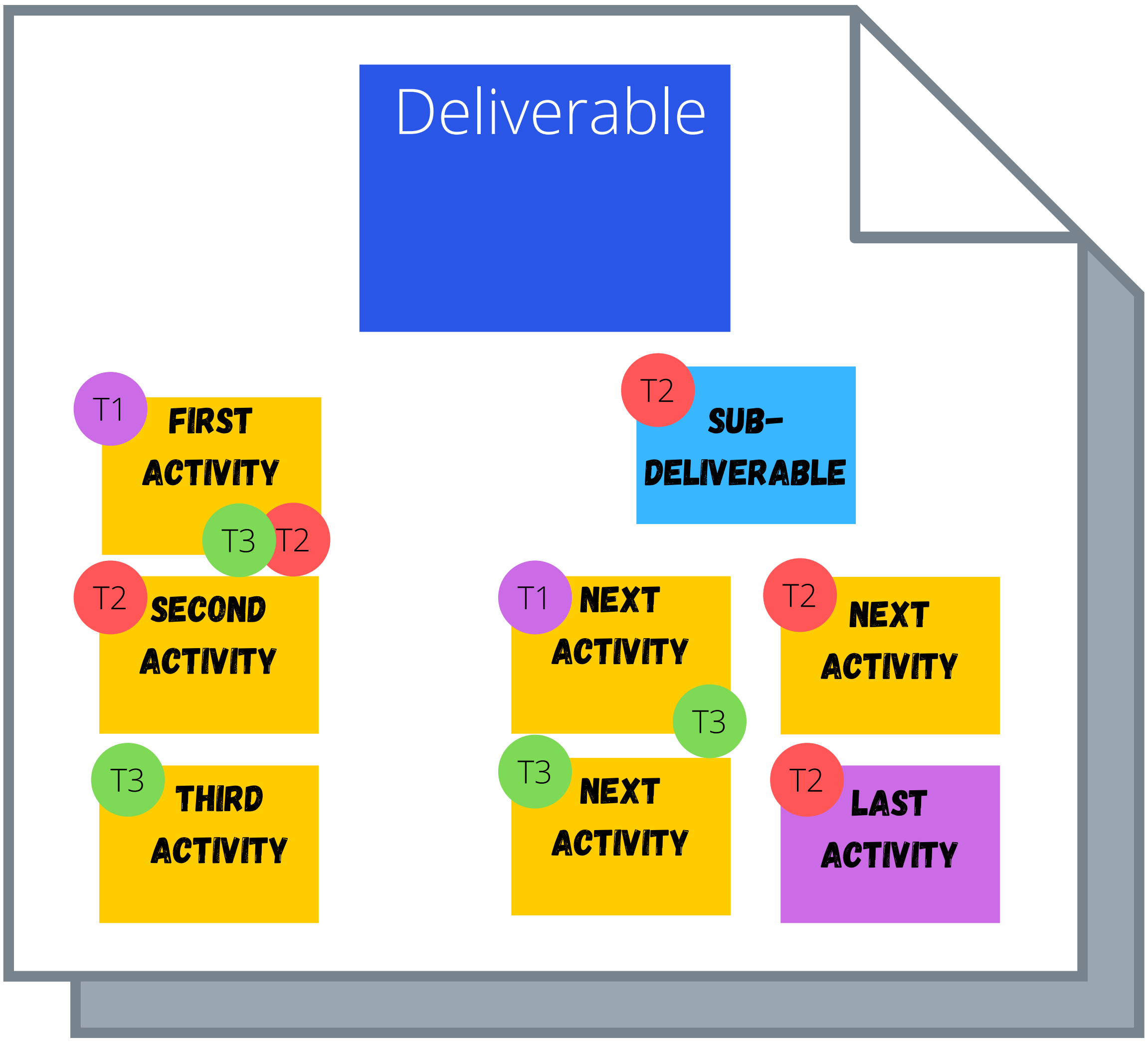
PL T1 T2 T3 PS

**Step 4: Assign Activity Owners**

As before, work with the team to assign owners and identify collaborators for each of the activities under each deliverable.

Friendly Reminders

- Assign only one owner per deliverable
- Every activity must be assigned an owner
- Not every activity needs collaborators
- Identify collaborator(s) who will directly contribute to the activity
- Do not include "interested-only" individuals as collaborators.




As the team conducts this exercise, it is common for the team to identify new activities or sub-deliverables they missed before. If this occurs, simply add that activity and complete the assign owner & identify collaborators exercise accordingly.

**Step 5: Build Momentum by Identifiying Next Steps for Next-Up Activities**

As b...

# Navigate the Obstacles

This section will show you how to prepare your team to and all obstacles that inevitably face every project team.

**Navigate the Obstacles** is all about understanding that obstacles can and will arise with any project you undertake. Many project teams vastly underestimate the amount of hard work that goes into completing each activity within a project. By its very nature, a project introduces change, which means each activity and deliverable the team needs to complete is likely new and different to them. The trick is to instill a healthy level of skepticism in the team when approaching each task while boosting confidence in their ability to overcome any and all challenges. You, as the project leader, will be instrumental in helping the team to identify and remove all obstacles that arise throughout the project.

To overcome this common challenge, you will **Navigate the Obstacles** by learning and applying each of these steps:

- Step 1: Validate the team's confidence
- Step 2: Create a navigation plan
  - Step 2a: Apply the Five Assumptions for Anything method
  - Step 2b: Identify potential obstacles
  - Step 2c: Create a navigation plan
- Step 3: Conduct a daily check-in to maintain momentum

At the end of the section, you will have a clearer understanding of the common types of obstacles that can plaque a team; how to spot them earlier; and how to maintain momentum by breaking through each obstacle.

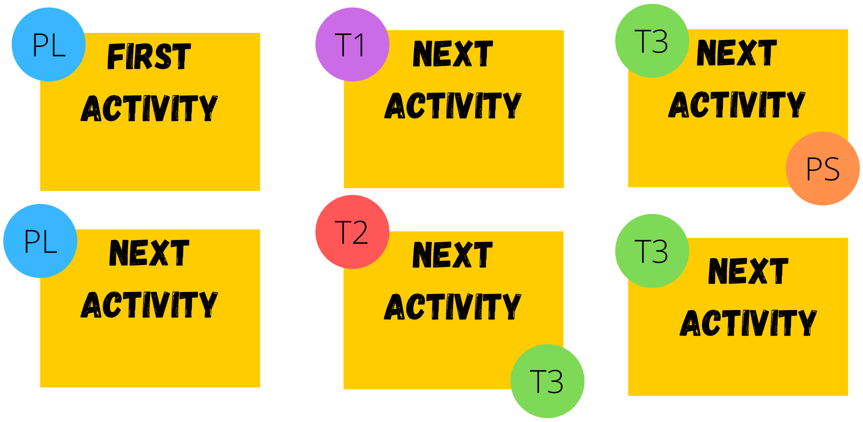
# Apply the Method

Now it's your turn! This section will walk you through, step-by-step, in how to **Navigate the Obstacles** in your project.

Most people fall prey to the thinking that any activity or goal can be met following a straight path free from obstacles. As the world speeds up, continually introduces change, and as we try to keep pace with this speedy change, almost all of us will face inevitable obstacles in our path. The obstacles themselves are not the issue, since obstacles are obstacles - not much we can do about life events that come our way. Its the unprepared individual that doesn't foresee the obstacle coming that is the problem.

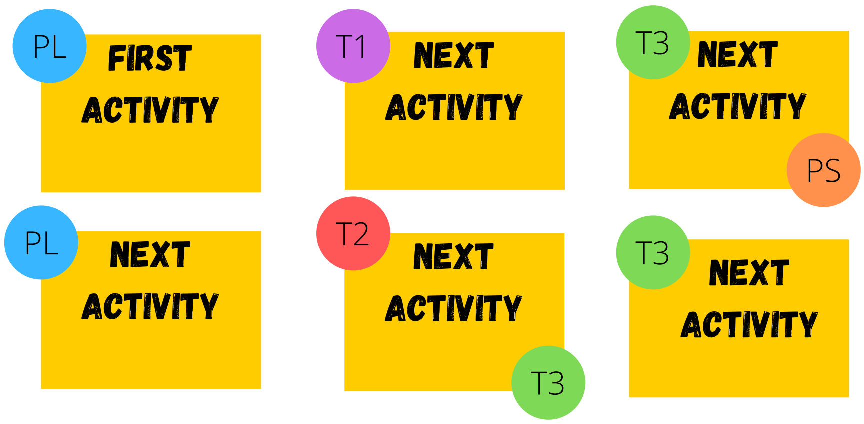
## Step 1: Identify next activities

If just starting your project, use the first activity priorities from your planning session to prepare your team to navigate the potential obstacles they may face.



### Confidence Statement - Continued

Demonstrate for the team by selecting one of your activities. If you do not have a next up activity, select any activity from the project work breakdown - past or future. The importance here is to select a real activity where you can create a real confidence statement in this step, and continue to demonstrate follow-on steps to come.




With your activity selected, write your confidence statement that represents your level of confidence in your and/or your team's ability to complete this activity, and state why.


### Write your confidence statement

How confident are you and why?

TIP: See the Real-World Example in this section for an example of a confidence statement.

After your statement is written, read out loud to the team. Ask the team to validate the confidence you have in self, and identify any additional reasons you should have confidence in self and the team's ability to achieve the activity.

## Apply the Method - The 5 Assumptions for Anything

Using your assigned activity used to created your confidence statement, identify the common assumptions you may have regarding your activity.

Instructions to team: "Now that I, the Activity Owner, have written my confidence statement to reflect my best expectations, I will now plan for the worst so that I am empowered to anticipate and address obstacles."

| Type | Assumption | Potential Obstacle |
|---|---|---|
| System | | [Leave blank] |
| System | | [Leave blank] |
| People | | [Leave blank] |
| People | | [Leave blank] |
| Knowledge | | [Leave blank] |
| Knowledge | | [Leave blank] |
| Outside Dependencies | | [Leave blank] |
| Outside Dependencies | | [Leave blank] |
| Time | | [Leave blank] |
| Time | | [Leave blank] |

Try to identify at least one assumption for each assumption type. When you, the Activity Owner, finish writing up the initial list of assumptions, ask your collaborators and/or team for input into any others you may have missed.

Focus on just the Assumptions column in this step.

### Apply the Method - Identify Potential Obstacles

For each assumption, now identify the potential obstacle that would arise if that assumption is no longer true.

Instructions to team: "For each assumption identified in the previous step, now let's identify the potential obstacle that would occur if that assumption is not true. Also state the impact."

A simple way to state the potential obstacle is to restate the assumption in the negative, then indicate the impact it would have. See the example below for guidance.

| Type | Assumption | Potential Obstacle |
|---|---|---|
| System | I have access to the system. | I don't have access to the system. Must submit ticket to IT to reset access, losing 1-2 days. Deadline missed. |
| System | | |
| People | | |
| People | | |
| Knowledge | | |
| Knowledge | | |
| Outside Dependencies | | |
| Outside Dependencies | | |
| Time | | |
| Time | | |

A simple way to identify the potential obstacle is to restate the assumption.

### Apply the Method - Create a Navigation Plan

With assumptions identified, and potential obstacles indicated, you are ready to create a navigation plan. The intent here is to identify specific actions you can take now or soon to mitigate or remove the potential obstacle.

See the example below for guidance.

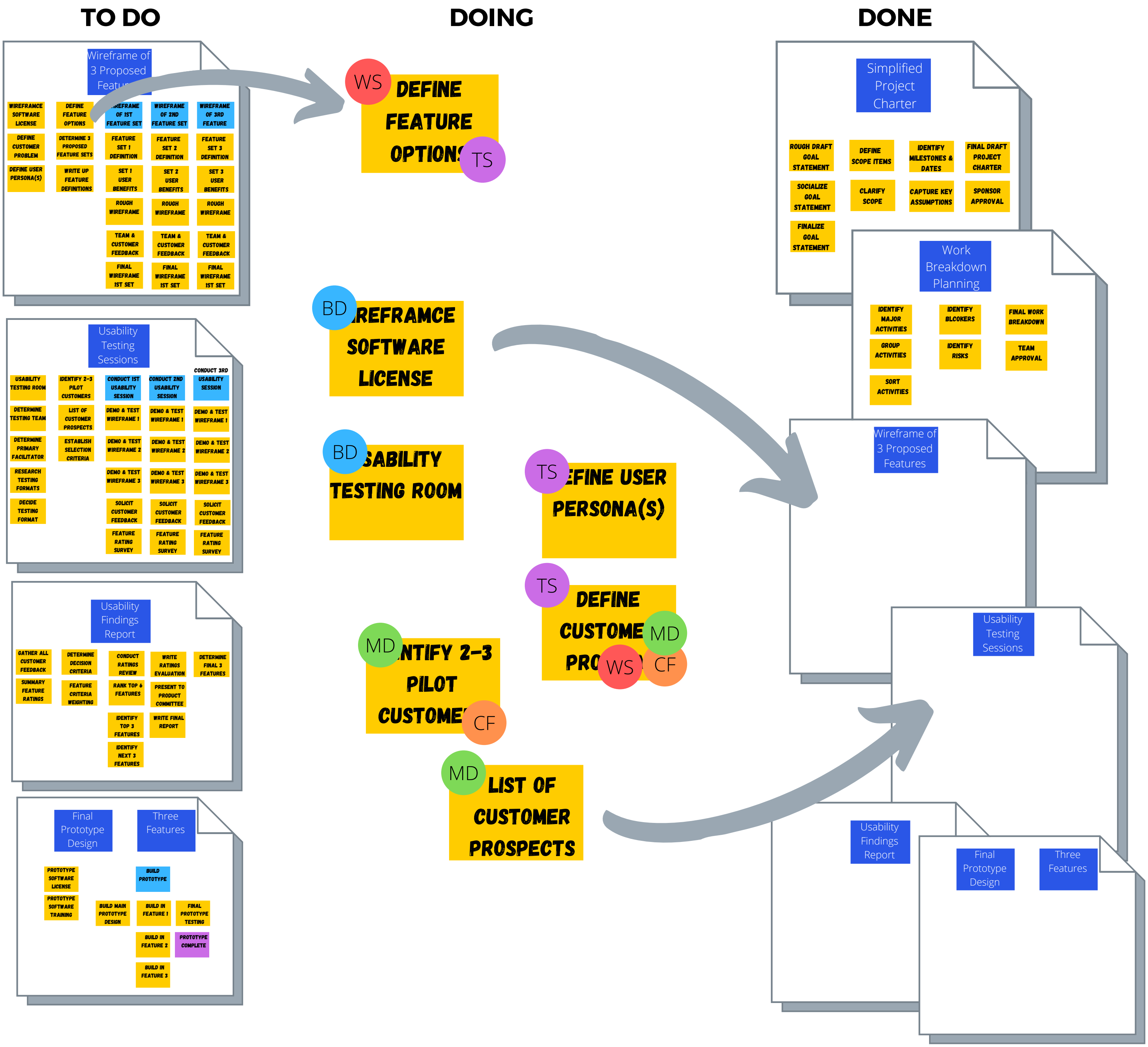
| Assumption | Potential Obstacle | Navigation Plan |
|---|---|---|
| I have access to the system. | I do not have access. My access expired. Need to submit ticket to IT to reset. Losing 1-2 days. Missed deadline. | In next 10 minutes, I and each collaborator will log into the system to verify access still works. Also validates we know how to navigate to the system. |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

You now have demonstrated for your team how to both validate confidence via the confidence statement and plan for the worst by creating a navigation plan. This helps you overcome the potential overoptimism by creating a set of specific steps you can take to mitigate or remove each of the potential obstacles.

## Daily Check-In

During Daily Check-Ins, have team

1. Moove completed activities to DONE column
2. Identify next-up activities and move to TO DO column
3. Conduct the Five Assumptions and Create Navigation Plan exercise
4. Identify next steps Activity Owners can take in next 10-15 minutes and today



# Focus on the Goal

Inspire commitment and foster collaboration across the team. Ensure each team member has the skill, knowledge, and tools to complete each task and deliverable. Maintain focus on achieving the goal!

**Focus on the Goal** is all about eliminating the everyday distractions that will pull at the team's attention. Distractions can come from outside the team as well as within the team. Distractions from outside the team can be a new business initiative; a manager or executive who provides mixed direction to the team that may conflict with the project goal; other stakeholders who have needs that seem urgent, but are less important than the project. Distractions from within the team can be pursuit of scope that is beyond what is needed to achieve the project goal; a team member that continually goes off topic in meetings; analysis paralysis that is caused by over-analyzing every aspect of the project.

To overcome this common challenge, you will help the team **Focus on the Goal** by learning and applying each of these steps:

- Step 1: Create a Focus Plan
- Step 2: Empower team to make decisions
- Step 3: Create safety and security for the team
- Step 4: Continuously learn and adapt

At the end of this section, you will  This step will empower your team to take action now in pursuit of the project goal.

# Apply the Method

Now it's your turn! This section will walk you through, step-by-step, in how to **Navigate the Obstacles** in your project.

Many of us underestimate the sheer number of distractions that pull at our time. Even with some awareness of the volume of email, customer distractions, and random tasks we must manage each day, true appreciation of this distraction is better felt when experiencing the absence of distraction. Otherwise known as focus.

The opposite of distractions is focus. The more focus you and your team have, the more momentum you can build on your project. While some of these principles

### Limit distractions

Help the team limit distractions by recognizing the myriad of distractions that pull at their attention, and identifying a Focus Plan.

| Distraction | Focus Plan |
|---|---|
| 100's of emails in inbox (many not relevant) | Team sets self-imposed rule of "no email before noon" whereby all focus is on project work. |

### Encourage team to make decisions

To furhter help team build momentum, empower them to make decisions, both minor and major. For major decisions, apply the DACI Decision-Making Framework to provide a more structured approach to evaluate all considerations and decide.

| Distraction | Focus Plan |
|---|---|
| Simple decision | Empower the Activity Owner to make a decision. |
| Complex decision | Use a decision-making framework to capture team input in a way that empowers the team to make a decision. |

For complex decisions, the DACI model can be most effective at empowering the team to drive decision outcomes instead of spinning. A brief introduction to the DACI model is presented here. More applicable guidance will be provided in the Real-World Example and Apply the Method sections.

The DACI decision-making framework creates clear roles and responsibilities for decision-making, and provides a method for capturing stakeholder input as to build a shared understanding of the options available from which the team should choose.

## DACI Decision-Making Framework

This framework was first developed at Intuit, where a modification of the RACI framework was adapted to create roles and process for driving decision-making.

The DACI framework modifies the roles to establish decision-making roles and responsibilities within the team. DACI stands for:

- D = Decider
- A = Approver
- C = Consulted
- I = Informed

The Decider is the person empowered to make the decision (or recommendation) to the Approver, who is the person ultimately empowered to approve the final decision. The person(s) consulted help the Decider think through who has expertise or input relevant to informing the final decision. Informed is all other people who need to be notified of final decision outcome.

| Options | Option 1 | Option 2 | Option 3 |
|---|---|---|---|
| Description | | | |
| Pros | +<br>+<br>+ | +<br>+<br>+ | +<br>+<br>+ |
| Cons | -<br>-<br>- | -<br>-<br>- | -<br>-<br>- |
| Risks | | | |
| Cost | | | |