

Getting Settled

Assume you made the decision to change, meaning you were hired into a new company or were transferred from one group to another within the company you are in. For whatever reason, your situation today is not what it was yesterday. This means you have to make a change in yourself. You must be in charge and must show your leadership style from the very outset.

To start, get a sense of the big picture, the lay of the land. First, you should fully understand the organization—this means the company organization and the project organization. The best way I know to get an overview of the formal organization is to ask for an organization chart. Then, you need to understand your bosses. Do your homework and find out just what kind of people they are. What are their likes and dislikes? What are their other personal traits? Only when you know all these things can you approach your boss with an issue and get something done. Next comes the power structure. Who drives the organization? Sometimes the answer to this question is surprising. Next make friends and alliances—you need them in order to get your job done. Finally, you are ready to take over the project you will lead. How do you do that to ensure you are leading the project to success from the very first moment? This chapter tells you how and makes some real suggestions to get the job done.

Getting the Lay of the Land

Getting the lay of the land means understanding the company, the unit, the products, the project, and the people. What about the attitude of the people in the company? Are they all working together or are there self-serving cliques? Were you immediately treated as one of the family or have you had to earn your way? Will you be accepted or will you forever be the guy from somewhere else? Every company is different,

and each has its own character and its own idiosyncrasies. You must understand the character or you will forever play “What happened?” I remember when I moved from New Hampshire to Houston, I immediately became one of the family. This mainly had to do with my technical expertise, but it also had to do with the people. The people were, by nature, open and friendly, but the most important factor was that the program was brand-new, and everybody had come from somewhere else. There was no organizational inertia to overcome. However, when I moved from Houston to Philadelphia, it was another story. Philadelphia was the headquarters for the company I worked for, and most of the people there had always been there. “Always” is not an exaggeration. Some had been there for thirty-five years and more. I was treated as an outsider, but then again, so was everyone else who had moved in from the field. Over time I made peace with the technical and management staff, but I was never fully accepted by most of the clerical staff. They were as polite as they had to be, but there was always an undertone of having the lowest priority for my clerical work. You can fight this kind of situation if you want to, but have you ever heard the expression “pushing a wet rope uphill?” That’s about the size of it. If you can’t convert the entire workforce, get enough people on your side to get the work done. Understand who has the ability to expedite work, and, conversely, who can hold it up. Gripping about the situation won’t help. Frequently, a lunch or two with the right people will help. It is amazing how people take on a different mantle when they are in a group of “their own” but become affable when you meet with them on an individual basis. If you handle these one-on-one situations diplomatically, these folks will frequently take your message back to “their own,” and you will become more and more accepted.

These are the kinds of things you may be exposed to whenever you move to a new location. I can only suggest that you start with diplomacy. It’s easiest to start as a diplomat and then lapse into your street-fighting mode if necessary. But, once you expose your street-fighting side, that’s where you’ll stay. The higher the level you are hired or transferred to in an organization, the fewer of these kinds of problems you can expect to have. But, even then, there’s no guarantee. Some of it relates to the environment, and some of it relates to you. In addition to learning about the general organization, do your homework, and discover everything you can about your new bosses, not to be nosy, but to be more effective. If you take a problem to your boss, how should you present it? Should you ever take a problem to your boss? As silly as this may sound, you

may get a response you didn't expect. Perhaps the response is "Don't bring me problems, bring me results." This may be because your boss wants to train you to solve your own problems; it may be because he or she is too lazy to be bothered. You need to know. Perhaps the response is something you did not expect—a total whirlwind. You've turned the machine on, and now you can't turn it off. It's out of control—most certainly it's out of your control. Don't get caught in this kind of situation. Your boss may hand you a solution you can't live with! Furthermore, your boss will then expect you to implement his or her solution, and be in your stuff at every turn until you do. It is best to go in with your own solution and give your boss the opportunity to say: "Yes." That's the easiest solution, and the one they normally take.

Before you make your next move, get a copy of *Games People Play*,¹ and understand that different people have different games they play. To understand that you are in the middle of a game—and that it has a name—is halfway to fixing the problem.

The Organization

What is the company organization, and what is its character? What is the source of project personnel? Will your people be provided through a matrix organization, or is your project "projectized?" To whom do you report functionally? Is there a "dotted line" reporting scheme? Is there a centralized Project Management Office (PMO), or are the projects on their own?

Phew! That's a bunch of questions, and the answer to each is important. Let's take a look at each one.

What is the company organization and character? Is the company a Research and Development (R&D) organization? Is the company a manufacturing organization? Is the company a services organization? Is the company a hardware-oriented organization? Is the company a software organization? I don't mean to answer a question with other questions, but these distinctions are important. Each organization type has its own character, and you must understand what that character is. If all your experience has been in manufacturing and you are going into an R&D organization, you will find the character of the two quite different. I've only presented two company types for purposes of explanation. There are, of course, many other types, and you need to be aware of what you are getting into. Sometimes, the purpose of the organization is not consistent with the usual character of the organization type. For instance, early in my career, I hired into an R&D organization. It seemed reasonable to expect an R&D atmosphere, right? Well, it may

have been reasonable to expect that atmosphere, but that's not what it was. This organization was a spin-off of an old-time manufacturing organization, and they carried their manufacturing rules and policies with them when they founded this new R&D arm. There was difficulty in the organization from day one, and it continued for as long as I was there. It's one of the main reasons I left. Some time later, the organization changed, but only after there was a change in upper management resulting in a change in management philosophy. Look at the organization you are going into and understand its expectations. For instance, if your new organization is an old-line manufacturing organization, expect the procedures to be solid. You will need to conform to the mold. The emphasis is on production, even for the projects. If your new organization is a new software house, expect a lot of serendipity and few procedures. The emphasis will be on creativity. Over time, this attitude will change . . . if the company survives.

How does your new organization provide the personnel to the projects? Will your project be a matrix, or is it "projectized?" To recap the operating characteristics of a matrix organization, let me say that a project operating under the matrix concept gets its personnel from functional organizations. These personnel get their raises from their functional managers and thus owe their allegiance to the functional manager. What does this mean to you? Simply stated, you are required to provide more leadership and fewer orders to get the project personnel to do what you need them to do. Some "enlightened" organizations (where the higher management has been a project manager) institute a process that allows the project manager to have a heavy input to the individual's performance evaluations. This action gives the project manager a lot more leverage in the individual's performance appraisal, meaning his raises!

On the other hand, if your project is projectized, you have considerably direct control because you are the one who passes out the raises and promotions. You can expect responsiveness to be a lot more crisp.

To whom do you report functionally? This means purely and simply, who signs your paycheck, your promotions, and your raises? Is there a "dotted line" reporting relationship? A dotted line simply means this is the office that coordinates and may temporarily control your operating activities. Is there a straight line and a dotted line to your function? If this is the case, you report functionally to one office and are technically directed by another office. This is usual for quality assurance people and is used with project managers whenever the centralized PMO staff concept is used (see below).

Is the Project Management Office (PMO) a LINE function or a

STAFF function? The PMO usually has one of two functions. If it is a LINE organization, it is the organization element from which all project management activities emanate. In this case, the PMO is the directing agency for all project activities in the company. It is the creator of all project management policies, plans, processes, and procedures. It is the “home” or functional organization of all project managers. It makes assignments and controls the activities of project managers to each project. The line PMO controls the raises of the project managers.

Alternatively, it can be a STAFF organization from which project management activities are coordinated. In this case, it is the creator or coordinator of project management policies, plans, processes, and procedures. It “logs” projects and may receive reports from ongoing projects. In some cases, the PMO will simply collect and post project performance data. But, the project managers do *not* report functionally to this PMO; instead, they are technically responsible to the PMO for employing the policies, plans, and procedures demanded by the PMO but functionally responsible to their line functional manager or director. The functional manager, in this case, controls the project manager raises.

What does all this mean to you? It means you need to understand the position and authority from which you operate whenever you go into a new organization. You should know who signs your paycheck and who signs the paychecks of the people on your team. You should know the method of control you have over the personnel on your project. You must know to whom you report and in what capacity. By knowing all these things, your assimilation into the new organization will be a lot easier.

The Power Structure

There are frequently two elements of the power structure in any organization. These elements are the organizational structure, reflected by the organization chart hanging on the wall and the infrastructure that is never written down.

Ostensibly, the organization chart reflects the power structure of the organization it represents. The closer one is to the top, the more power he or she has. Power, usually meaning the ability to give orders, is directed downward. However, in many organizations, the power structure is not the same as the organizational structure. Indeed, it is sometimes amazing to see who in the organization has the true control of what goes on.

The infrastructure is a loosely gathered network of people involved

in information and activity flow. It is always interesting to find who the king or queen of this network is. Frequently, the person resides among the secretaries and the clerks. But be careful. If you listen to this network, you must also have a “rumor filter.” You must be able to filter out what is rumor and what is fact. Over time, you will be able to distinguish between those who think they know what’s going on and those who really do.

All these things create the organizational dynamic, and you must learn what makes the dynamic move and get things done. If you don’t understand the dynamic, you will be treading water while others are succeeding. Every good project manager keeps his or her finger on the pulse of both the organizational structure and the infrastructure.

These things are very subtle. As I mentioned in the story about going to headquarters earlier in this chapter, the power structure can be among the clerical staff. Do they give the orders? No, but they do control work flow and who gets what and when. You are either in or out. Sometimes you may be tolerated. Can you do anything about it? Let me tell you a story that circulated about Lyndon Johnson when he became president of the United States. On his way up, some functionary in the Interior Department made a change to the application of policy that radically affected his ranch in Texas. Johnson was furious. Some months after he became president, one of his friends asked: “Did you fire that guy?” Johnson answered, “Fire him? I couldn’t even find the SOB.” That’s the way a lot of these things are—very subtle.

In addition to the organizational dynamic, you must also understand the organizational culture. In a new organization, the culture will reflect the desires of the leader. In an old-line organization, the culture will reflect a conglomerate of the desires of all the past leaders of the organization and, to some extent, the people of the organization.

Even the culture of an old-line organization can be changed by a dynamic leader, at least temporarily. When a new general manager, CEO, or other “top dog” comes into an organization, it is normal for that person to demand the organization follow his or her dictates. Depending on the leadership and time of tenure, the culture of an organization may be changed. On the other hand, the inherent strength of the culture may render the new “leader” ineffective or it may return to its roots as soon as this person goes away.

What does all this mean to you? Simply that you must keep your eyes and ears open when going into a new organization. You can read and understand the organizational policies and procedures, but you must discover the organization’s dynamic and its culture. If you don’t, you are in for a lot of frustration.

Making Friends and Alliances

If you are hired for or assigned to an ongoing project, the best advice I can offer is to first conduct an audit of the project. The audit should at least cover scope, budget, schedule, and customer opinion. Determine if there are any specific issues plaguing the project and who or what has been involved with these issues. Document your findings. The thing you want to do is to establish a starting point from which you are considered responsible. Whether or not you present these findings to your management is a political choice. You must make that judgment.

When you move into a new position, you need to do two things: listen and exhibit confidence. By listening, I mean just that. Talk to those who have been with the project for a while and understand the dynamic of the project and its strengths and weaknesses. You are likely to get some conflicting views, so be careful in sorting out the data. By confidence, I don't mean cockiness, I mean confidence. You get confidence by knowledge and performance. You must understand what your new position is all about and then apply your past knowledge and experience to that situation. Once you have a good feel for that, you should look for alliances to establish. Hopefully, you have been there for a few days and have had your eyes open to see who knows what and who claims they do. They most certainly fall into two different piles, and you must be able to separate them. Your purpose in making friends and alliances is to get the job done. If you are at a high enough level, you may bring some staff with you. However, unless you are at the director level or above, you are probably on your own. Remember, whenever you select your friends and alliances to be a part of your team or to support your team, you are not selecting someone to drink beer with. You are selecting people that will make or break your project and your career by their performance. Select them carefully.

Before you start to select your people and make allies, keep your eyes open for high performers to create a core team. Once you have confidence in a core team and they in you, start selecting the next levels of people for your team. Consider group interviewing using the Targeted Selection Process. The core team members will have been there for a while and will have more insight into who are the performers and who are not. This strategy just makes your initial job easier. Now you only need to select a few key people, and they will help you fill out the team.

It is usually a good idea to work with your core team and to keep

the project team member selection confidential until the time is right to make the information public. At this time, all the kinks regarding proficiency and availability have been worked out and your selection process appears to be smooth and complete. For your first team selection, it is not unusual to conduct interviews with the potential team members, much as you would if you were hiring them. All this presumes you have the latitude to make these selections. Interestingly, even though you may not have been told you have this latitude, you can discuss it with your boss. I did this once, and the reason I had not been given that latitude is that no one thought of it before. When I discussed it with my new boss, he agreed, and away we went. Of course you need to read your new boss. It's a good idea to do your homework and find out the nature of your new boss before taking on a position. He or she can just as easily hand you your head as agree with you.

Taking Over a Project

The first question to be answered is: Why are you here? Were you hired to take over and lead this project? Were you moved into a position to take over this project? No matter which question you answered, the first thing you need to do is to get your act together. By this I mean, when you walk into the project, walk in as the project manager, not as someone looking for friends. In other words, walk in strong, not weak.

Have you gone through all the prior steps of this chapter? Do you understand the organization? Have you made the alliances you need to make? If you are coming in from the outside, make these steps carefully. Get answers to these questions by talking to your trusted contacts inside the organization or to the person who hired you. If you are already in the organization, you may already have a feel for these situations. The point is, get the questions answered and the issues resolved at the outset.

First, what are the conditions you are looking into as a project manager? There are usually six combinations:

You are hired for a new project.

You are transferred for a new project.

You are hired for an ongoing project that is running well.

You are transferred to an ongoing project that is running well.

You are hired for an ongoing project that is in trouble.

You are transferred to an ongoing project that is in trouble.

It is important to understand which of these conditions you are facing. Hopefully, you had an opportunity to find out the condition of the project

before taking the job, but this does not always happen. No matter what, you must still get your arms around the situation before going any further. In the above list, it is clear that the first four situations are the best and the easiest to tackle. The last two situations are more difficult.

You have just been hired or transferred to take over the project. Has there been a problem? What was the problem? Listen to the people who are already there. Likely they will have some insightful ideas of what the problem is all about. Be very careful in your assessment of each individual input. Audit the inputs and the project performance figures and derive your own solution. What is the solution, and how will you implement it? Will you make organization changes? Will you make changes to the order of work? This is the time to broach all these questions (and any others that may be appropriate) and have your answers ready. Modify the project plan so that your approach is documented. Then, present the changes to the team. Nothing makes an organization understand that you are in charge more than making organizational and procedural changes, but they must be the right ones.

When you are ready, call the team together and make your presentation. It is not necessary to be gruff or unfriendly, but you do need to let the team members understand you are in charge. You don't ever say that, you do that by having your act together. Don't make your presentation with a strong voice, make it with a strong plan. Of course the antithesis of this is to be placed in a position where you have no time to prepare. Don't let that happen. Even if it's just overnight, be prepared to take over.

The adage "You never get a second chance to make a first impression" is absolutely true. Be ready to make that first impression, and make it with positive strength.

Up until now, you have been getting ready. You looked at the origins and development of project management. You looked at your background and where you wanted to go. You put the two together, and you were hired or moved into getting a position to lead a project. Now it's time to get serious in leading the project or program, but first you need to know what each classification is all about. Are you going to be a one-person project manager? Are you going to lead a project or a program, or are you going to lead a large-scale project or program? These are all valid questions and must be answered.

Note

1. Eric Berne, M.D., *Games People Play* (New York: Ballantine Books, 1996).