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Leading Project Teams

INTRODUCTION

John's Promotion

John Billings was looking at his boss, Mark White, feeling a new admiration for the man, but also feeling more than nervous about what this meeting meant for him. John's boss had been promoted to department head in their division of APEX, a large government-contracting firm. When Mark received his promotion, he recommended John to fill his position: one of three section leaders who report to the department head. John jumped at the opportunity and soon would receive a hefty increase in salary along with his promotion.

In this meeting, Mark was laying out the various accounts John would be taking over when these feelings of admiration and anxiety began to emerge. Two accounts were still in the negotiation stage. One account was ready to launch. Three more were continuing projects, but one of those was scheduled for closing at the end of the month.

John knew everyone in the section, of course, but now he would be dealing with them in a whole new way as section manager. In addition, he would be dealing much more closely with higher management, clients, and others outside the department in his new position.

John admired Mark because he really was a good leader and obviously deserved his promotion. His boots would be hard to fill; and that began to make John nervous. Despite working on projects in the section for some time now, John realized that he had only the smallest notion of what he would have to do to be successful in his new role as a project manager.

Chapter Overview

John's concerns are widely shared by those new to leadership positions, whether they are taking over a single project or a whole "section-load" of them like John. This entire book is devoted to project leadership issues, but

here we address three more sets of issues. The first concerns expectations others have of a project leader. Project leaders are called on to play many, often conflicting, roles for various stakeholders. We identify many of the more common role expectations and offer some advice about addressing them.

The second set focuses on the leadership of a project team throughout the life of a project. Project leaders need to lead projects differently depending on where they are in their life cycle. John, for example, will need to lead each of his project teams differently because the projects are at different stages in their life cycles. He will also have to work with each project's other stakeholders differently for the same reason. We examine the different needs of projects depending on their life cycle stage and what leaders should do to address those needs.

The final set of issues deals with the leadership needs of individual project members. Project personnel come and go on projects and need different kinds of leadership depending on their "job maturity" in doing the project's work. We finish this chapter by discussing individual project member leadership needs and how best to develop project staff.

THE ROLES OF A PROJECT LEADER

Leaders are expected to play a role in their organizations just like everyone else. The leadership role, however, is complex, and different people have very different, often conflicting expectations of a leader. Because the leadership role is so critical to project success, we examine some of the more typical expectations stakeholders have of a project leader. We conclude by suggesting how leaders can negotiate some of the expectations stakeholders have of them.

The roles played by organizational leaders have been studied for some time. Two particularly well-known and appropriate studies are those done by Henry Mintzberg[1] and Luthans and Lockwood.[2] Although Mintzberg focused on higher level managers and Luthans and Lockwood focused on supervisors, their studies share some common elements that are particularly applicable to project leaders. They are integrated here with an eye toward the role demands of project leaders. We classify them into those role expectations held by external and internal stakeholders.

External Role Requirements

Figurehead and Spokesperson

By the nature of their position, project leaders are the **figureheads** of their projects. They are called on to represent their projects at most, if not all,

public functions. It is important, then, for project leaders to display proper demeanor in all public venues. Stakeholder and public judgments of the project and its team are influenced a great deal by the demeanor and behavior of its chief representative.

As the chief representative of the project, leaders are also called on to be their project's **spokesperson**, whether giving formal presentations of the project before large groups or speaking one-on-one with individual stakeholders. It is important for project leaders to be up to date on the status of their projects and to be able to communicate the progress, needs, and benefits of their projects to external stakeholders when required.[3]

Liaison and Monitor

In the previous chapter, we explored the key position project leaders occupy at the center of the larger network of project stakeholders. Because of that position, most project business is conducted through project leaders in their role as **liaison** to the project.[4] Project leaders need to actively embrace, develop, and maintain their liaison role, not only for the good of their projects but for the good of their own careers as well.

The liaison role has both a formal and an informal side to it. Formally, project leaders are called on to do business with suppliers, clients, management, the public, and other stakeholders. Informally, project leaders are often expected to socialize with stakeholders to develop closer ties with them. Many project leaders are less comfortable performing this role, and socializing can be quite time-consuming. Shareholder concerns, problems, and opportunities for the project, however, are often first encountered, and can be dealt with more effectively, on these informal occasions.

The project leader also plays a role as the project's **monitor**. The project network is a principal source of information about stakeholder needs, concerns, resources, and intentions with regard to the project. In the role of monitor, the project leader needs to continually observe the network of stakeholders to get important project information, anticipate project problems, and take advantage of opportunities as they arise.

Champion and Negotiator

Project leaders are often expected to be the **champions** of the projects they lead. Project leaders must be able to communicate the benefits and needs of their projects in terms that speak to stakeholder interests. Working with their ties in the larger project network, leaders also need to help members of their project team resolve difficulties they may encounter outside the team.

Because of their position, stakeholders turn to project leaders as the **chief negotiator** for the project. The negotiation role is particularly pronounced in the early stages of a project. When stakeholders first come together, all project parameters—scope, costs, and schedule—are open for negotiation.[5] The project leader's key objective in these negotiations is to ensure project success. What "success" means for the project in terms of its objectives, and what the project requires to be successful, need to be realistically matched.

Negotiations also occur throughout the execution of the project. Stakeholders often ask for more products or for other project changes as they clarify earlier expressions of their needs. Project leaders may have to adapt to these adjustments, known as scope creep, but must work to make sure that they get the additional time and resources to do so.

Controller

Clients and higher management in the host organization expect project leaders to control their projects. Essentially, the **controller** role means that the project leader makes sure the project is proceeding as planned—producing deliverables according to specifications, in line with the budget, and on schedule. Day-to-day problems with project tasks are generally expected to be handled within the project itself. Larger problems may arise, however, to threaten the project's deliverables, costs, schedule, or other outcomes. Because projects are unique endeavors, these problems are not uncommon—the more unique and complex the project, the more common the problems. Project leaders need to monitor their projects carefully, then, to spot emerging problems early and deal with them, as covered in Chapter 5 on risk management. If problems need to be brought to the attention of stakeholders, however, project leaders should have plans about how to regain control of the project and what resources are needed to do so.

Internal Role Requirements

Planner and Resource Allocator

As **planner**, the project leader is expected to take the lead on all project planning. Although others may help in developing project plans, the responsibility for planning lies with the project leader. Team members look to the project leader to make sure project plans are doable. Project planning, moreover, is an ongoing process in project work. As a project unfolds, it becomes apparent that the best-laid plans have not been able to anticipate everything.

Project leaders are expected to look ahead in the project to spot and plan for unanticipated needs and changes.

Much the same can be said for what project leaders should do in their role as the **resource allocator** for the project. Initial project plans, of course, require project leaders to allocate resources among project activities. As the project moves forward, however, project leaders may need to shift resources from one activity to another, for example, to keep the project on schedule. Experienced project members know that resource reallocations are often required and that they may have to do the same or more work with less. That knowledge, however, does not completely ease their disappointment. It is important, then, that project leaders inform their teams as soon as possible when resources need to be reallocated and to tell those involved why such changes are necessary.[6]

Coordinator

As the project's **coordinator**, leaders need to ensure that all pieces of the project and the project team are working together toward their common project objectives. Although coordination is also a need in general management, when operations reach a steady state, coordination can be achieved with standard operating procedures. Despite all the efforts made in project planning, steady states are rare in project environments. Coordination, therefore, requires much more real-time work. Leaders will find that they need to meet often with their project teams and individual members to keep the project coordinated. Time needs to be set aside, then, for project meetings as part of the project plan itself (for a few tips on project meetings see the sidebar on Conducting Project Meetings).[7]

CONDUCTING PROJECT MEETINGS

An important task that usually falls to the project leader is to plan and conduct project meetings. Unfortunately, there is almost universal agreement that meetings are often poorly run, and many meetings are a waste of time. Project leaders can make meetings cost-effective if they keep a few things in mind: Meetings are like any other project task and need to be treated as such. Meetings also need to be planned and executed well and need to be properly followed up. These are covered, in turn, here.

- Meetings are like any other project task.

Project meetings are a necessary administrative support task. They need to be integrated into the work breakdown structure (WBS) and scheduled in the

project. Project meetings should have their own objectives with deliverables to achieve them. Plans need to be made to produce those deliverables, including the allocation of human resources (e.g., leader, scribe, participants) and other resources.

Two basic kinds of project meetings can be planned ahead of time: those for outside stakeholders and those for the project team. Meetings for outside stakeholders (e.g., clients and higher management in the host organization) are often scheduled at specific milestones in the project with meeting objectives related to those milestones. Some outside stakeholders might also wish to have periodic, recurring meetings just to keep informed about the project.

Project team meetings are primarily of two types: meetings at specific milestones and recurring periodic meetings. Team meetings at specific milestones (e.g., project launch, closedown, preparations for outside stakeholders at their milestones) will also have their objectives and deliverables related to those milestones. Recurring team meetings (e.g., every week or two) are conducted for a variety of task objectives such as real-time coordination of the project, information sharing, decision making, monitoring the project, and problem solving, among others. Project leaders should also be aware that team meetings are a venue to address socio-emotional or group maintenance issues such as attending to team morale and cohesion; resolving conflict issues; and developing and maintaining team norms, roles, and goals. A regularly scheduled meeting need not be held if these objectives and issues do not need attention or can be achieved in a more cost-efficient way. Attention is given here primarily to recurring team meetings and the task needs of the project.

- Project meetings need to be planned

The principal planning tool of any meeting is the meeting's agenda. The agenda can be thought of as the WBS of the meeting—the meeting's breakdown of discussion topics. Just as important, the agenda is also the principal organizing tool of the meeting.

An agenda contains more than just a listing of discussion topics. The primary issues relevant to each topic are laid out as well (try to keep them few in number). The project leader is assumed to take the lead on an agenda item unless that role is assumed by another meeting participant (e.g., a team member who is addressing a problem in his or her part of the project). Any expected outcomes are also specified (e.g., a decision or some coordinated response to a problem).

Agenda items also trigger other activities. If participants need information about an upcoming topic, it is sent to them (it's best to have copies at the meeting as well). Discussion leaders are tasked with their job (often the agenda itself is enough, but they may need some additional tasking). Any equipment required is reserved.

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Agendas are sent out ahead of time so that participants know what to expect and can give the topics and issues some thought and preparation before the meeting. The start and end times of the meeting are given and where it is to be held. At this time, input regarding the agenda is invited so that last-minute changes can be avoided. Participant input is evaluated in terms of the objectives of the meeting and whether it is the best venue for the participant to achieve his or her aims.

If possible, recurring team meetings should be scheduled to minimize interruption of workflow. Before regular work begins in the morning and just before lunch can be considered. Attention might lag just after lunch and at the end of the day. Consider a venue away from distractions yet convenient to get to.

Recurring team meetings are typically kept to an hour. If much more time is needed, consider another meeting or how issues might be handled outside the meeting. If much less time is needed, consider cancelling the meeting and covering the issues in another meeting or outside the meeting. Major milestone team meetings (e.g., project launch) may take a half a day or more.

- Conducting the meeting

The project leader usually conducts the meeting, but participants usually take the lead in their own presentations. A scribe is assigned to take relevant notes for later dissemination. The primary duty of the meeting leader is to keep the meeting focused on working through the items on the agenda and achieving the aims of the meeting. A balance is maintained between facilitating relevant discussion without wandering too far off topic.

Meeting norms need to be established and maintained. Meetings should start on time and end on or ahead of time. Participants need to stay focused on the task at hand—no irrelevant or disruptive side talking, texting, Internet surfing, and so forth. Interruptions should be minimized. Relevant participation should be encouraged and facilitated.

The meeting leader should open with a review of the agenda, invite comments or additions (hopefully few), and then walk through the discussion topics, ensuring input from relevant team members. When discussion of a topic is concluded, any action items are tasked out, acknowledged, and recorded by the scribe for later dissemination. Follow-up on these action items may well be added to the agendas of future meetings.

At the conclusion of the meeting, the leader summarizes the main developments important to the team, including action items and their tasking. Finally, clarifying input is requested and integrated; and the meeting is then brought to a close.

- Meeting follow-up

Minutes of the meeting should be disseminated to the participants. Nonparticipants who will be affected by the outcomes of the meeting are informed and their needs and actions coordinated in the project. Those tasked with action items are informed (the minutes may be enough) and their needs and actions coordinated with the rest of the project if needed.

Problem Solver

Because projects are unique endeavors, project leaders are generally confronted with a constant stream of problems. Although project leaders should develop and empower their teams to solve problems as they arise, the project leader has ultimate authority and responsibility for problem solving in his role as **problem solver**.

Few people like problems, and it is only natural to try to ignore or hide them. Project leaders, however, need to develop another mindset with the project team: Bring up problems before they get out of hand. With proper development and empowerment of the project team, team members will bring both problems and proposed solutions. Proposed solutions will need the consent of project leaders, however, because they are more aware of the ramifications of both the problem and the proposed solution on other components of the project.

Team Leader

Teams expect their leaders to lead them. In their role as **team leaders**, project leaders are expected to take the lead in all the major task and operational decisions of the project from project initiation to closedown. Teams also often expect their leaders to take the lead in handling the social-psychological or "people" issues that arise in every project. There are an endless number of social-psychological issues that confront project leaders, but motivation, discipline, and conflict management are three of the most common ones. Making sure to reward good work is the more pleasant side of motivating team members. Surprisingly, it is often overlooked, and the consequences of *not* rewarding good work can have quite a negative effect. Disciplining is often the more difficult side of the team leader role. The team expects project leaders, however, to spot and address lower performing members in a productive way. Here, too, there are important negative effects of *not* providing discipline when it is needed.

Conflict is also a common problem in projects because of the stresses and strains within them. Demanding schedules, unanticipated problems and the dependencies team members have with one another are only a few reasons why conflict emerges in a project. Conflicts over how best to do project tasks are not necessarily bad when they expose problems and help develop solutions. When conflict becomes more personal, however, project performance is likely to decrease. Knowing the difference and how best to manage conflict is also an important part of the team leader role.[8]

Project leaders are often so focused on task responsibilities that they can miss social-psychological problems until they grow to the point that they begin to undermine the project's performance. Leaders need to keep lines of communication open, not just on task issues but on social-psychological ones as well. Is coordination becoming difficult? Is communication within the team and with the project leader beginning to suffer? Is absenteeism on the rise? Are team members complaining about one another instead of task problems? These kinds of issues often signal people problems. As with task problems, dealing with social-psychological problems early in their development is far easier than dealing with them later.

Clarifying the Leadership Role

It is easy to become overwhelmed with the project leader's responsibilities. Most project leaders will attest, however, that the real problem is the conflicting and widely different expectations that team members and external stakeholders have of them. The project leader's role will never be an easy one to play. Project leaders, however, can take the lead in helping to *make* their own role rather than just *take* the role expectations of others. To do this, project leaders need to discuss their role expectations with critical stakeholders (e.g., clients, managers, and team members). Project leaders, for example, should set aside time during the launch of a project to discuss their expectations of the team and to solicit and discuss the team's expectations as well. The same can be said of working with managers and clients—first probing their expectations, and then discussing what can be done to address their most important needs. Although confronting and discussing role expectations will never solve all role problems, it can go a long way toward reducing them to manageable levels.

PROJECT LEADERSHIP AND THE PROJECT'S LIFE CYCLE

Different leadership behaviors are typically needed to respond to the needs found in different stages of the project's life cycle. We begin by examining

the leadership needs typically required in the early stages of initiation and planning, followed by those required in a project's launch. Next, we examine leadership needs in the execution phase from two perspectives: needs of the internal team and those of external stakeholders. Finally, we take a look at the project's closing stage, which needs to address concerns of the client, the host organization, and the project team. These stages become more apparent and distinct in longer projects. In shorter projects, they can blur into one another, but their leadership needs remain the same.

The Early Stages: Initiation and Planning

The initial stages of **project initiation and planning** begin when work first starts on a client's project. It ends when the leader finishes planning and organizing the project and is ready to launch it. Chapters 2, 3, and 4 are dedicated to the issues involved in the early planning stages of a project. We summarize and elaborate on a few of their key points here to address three leadership objectives in the early stages of project work. The first objective in this stage is to make sure the project is doable. The second is to organize the project, and the third is to begin acquiring the resources necessary to carry out the project.

There are at least two key issues leaders must address to make sure a project is doable. First, project leaders must determine the project's objectives and deliverables as well as their requirements in terms of the project's parameters—its work scope, costs, and schedule. The second part of making sure a project is doable is to develop agreement between the client, higher management in the host organization, and the project leader over these issues. That way, key stakeholders accept and support the project as planned.

Often, the most challenging of these initial tasks is to establish the project's deliverables. Clients often have only a vague idea of what they need in order to solve the problems they face. Project leaders, then, must help clients express and clarify their needs in terms of what a project can produce.

As a project's deliverables begin to be defined, the project parameters become issues as well—the work required, the costs, and the timeline. As they do, pressures begin to mount between clients, the host organization, and the project leader regarding their specifics and what is reasonable for stakeholders to expect. Project leaders need to anticipate such pressures and negotiate for the critical requirements that will make a project feasible.

Once project stakeholders have agreed to these project's components, the leader's attention turns to more detailed planning of the project. Attention turns, as well, to organizing the project. The project needs to be organized from the broader project level down to the level of individual work. At the

broader project level, the project leader needs to determine the project's basic organizational structure. Here, project leaders lay out the major phases of project work as well as the project's authority structure—what positions will have responsibility and authority for accomplishing the various components of project work.[9] At the more detailed levels of the project, leaders should break down client and other project-relevant deliverables into the specific task deliverables required from each project member. The work breakdown structure and project scheduling covered in Chapters 3 and 4 are extremely useful tools in accomplishing these tasks.

Finally, the leader is called upon to set up and align project resources. The key resource in any project is the project team itself. Although some project leaders have a standing staff, many do not. In this case, as a project begins to form, leaders should start thinking about and recruiting key project personnel. The earlier this can be done, the better, for at least three reasons. First, there will be competition for good staff—recruiting them early helps to ensure their availability. Second, key staff can serve as expert advisors in the project's planning. Third, as the project moves forward, key staff involved in planning can better assist in the project's launch and execution.

The project leader needs to think about securing other project resources as well. Those resources that are critical and more difficult to obtain command a leader's greatest attention. In-house resources may fall into this category. Those who have authority over the use of these resources are rarely happy about letting others use them. The earlier leaders address problems of resource commitment, the better.

Involvement in the early stages of a project provides leaders with two important outcomes. First, they have the opportunity to shape the project in ways that are best for the project and their teams. The second is that they will develop a deeper understanding of the project, which will serve as the foundation for future project direction and control. This deep understanding eventually takes the form of the project plan. In some cases, projects are simply handed to leaders to execute, and they have little opportunity to shape them. In those cases, it is still imperative for leaders to develop a deep understanding of the project, its components, and the rationale behind them.

Project Launch

Project launch begins when the leader initiates the execution of project work with the project team. The short-term objectives are to orient the team and have it begin work on project deliverables in an organized manner. The longer term goal is for the project team to assume management of the project's work as they move into the execution stage of the project.[10]

When a project is first launched, project members generally look to their leaders to tell them about the project and what they are to do. The more leaders demonstrate knowledge of the project, its needs, and their ability to handle them, the more confidence team members will have in them.

Initially, leaders should summarize the important outcomes of the initiation and planning stages so the team can be brought up to speed. The objective is to help the project team understand the project and their roles in it. The project's mission, objectives, and client deliverables should be presented first. This establishes the basic directions and goals of the project. Next, leaders should lay out the project's work and organizational structure. This tells the team how the goals will be achieved and what role each team member will play. This is an opportune time, as well, to present the basic norms of the project. Producing quality work on schedule is an important project norm to establish. A "no-surprise" norm might be another—when team members see problems ahead, they need to let their leaders know as soon as possible.

Once the leader conveys an overall picture of the project to the team, he or she should provide more details, down to the individual member level—the specific deliverables each member is to provide and when. Deliverables due early in the project should receive greater attention. With small projects and teams, this might be done all at once with everyone present. With larger projects, this might require a series of meetings focusing on different components of the project.

During the initial launch, team members want, and leaders should generally adopt, a more directive style of leadership—where the leader tells the team what needs to be done. The leader's objectives are to inform the team about the project and their roles in it, and to get project work moving ahead. Team members generally have these same desires and expect their leaders to proceed in this manner. Although questions of clarification will help the team move forward, arguments about the rationale behind the planning and execution of the project are usually better handled one-on-one.[11]

Once the project is understood by the project team, the leader's attention should concentrate on initial project work, focusing on both task and resource needs. Task attention focuses on whether project tasks have been initiated properly. Performing new tasks, for example, requires close attention until the team moves up the learning curve. Early production problems also may require attention, so initial work can proceed more productively. This is also a time to address any issues of task commitment. Leaders should pay attention to team members' task focus and the time spent on them. Resource attention focuses on making sure resources are flowing as they should—that the tools, material, staff, information, and other resources are

available when needed. Then, as the team settles into its work, the project moves into its execution stage.

Project Execution

Project execution begins when project work has been fully delegated to the project team, and project members have settled into producing the project's deliverables. It ends when the project enters its final, closing stage. The objective is to keep the project on track, and the project plan is the project leader's principal tool with its list of deliverables, work breakdown structure, schedule, and budget. To keep the project on track, leaders must accomplish a number of tasks during the execution phase of a project. Our focus is on monitoring and controlling project work in the project team and tracking the more critical external stakeholders: the client, higher management, resource suppliers, and regulators. Our discussions also focus more on the behavioral side of project leadership than on the technical issues of project control.

The Project Team

There is an old management saying: "You need to inspect what you expect." Leaders need to monitor project work to make sure it is progressing as needed. Different leaders monitor their projects and supervise their teams differently, but this may be more a matter of leadership style than leadership principles.[12] Too-close supervision can get in the way of good performance and staff development. Too little supervision can let the project get so far off track that it is difficult, if not impossible, to complete it on time or on budget.

As a rule, project leaders should not wait too long to see concrete, measurable progress being made on a project task, component, or phase. People have a natural tendency to put off work until near its delivery time in order to deal with other pressing matters. Sometimes staff may wrestle with project problems until too much time has passed before seeking help. When project staff must produce a concrete product on the way to larger project deliverables, however, it becomes much more difficult to put things off for too long. If, for example, a project job requires the results of a particular study, the design of the study, the acquisition of study resources, data gathering, analysis, and the writing of the final report are all subtasks that must be done to produce the study. The results of each subtask, then, can become a concrete deliverable that can be reviewed on the way to the ultimate product of the study itself. This kind of work breakdown is best done in the earlier stages of planning and conveyed to the project team as part of the project package in the project's launch.[13]

Project monitoring involves comparing what has been accomplished to what should have been accomplished by a certain time, and the project plan is the leader's principal tool. On many smaller, less complex projects, monitoring project deliverables is enough—comparing what has been produced to what should have been produced according to the schedule.

Cost analysis becomes more important on more complex projects as well as those done for profit. One way to monitor costs is to simply compare the actual costs of project work completed to what was budgeted for the work. When actual costs exceed budgeted costs, there is cause for concern—the more so the greater the difference.

Both costs and progress can be monitored using earned value analysis. The budgeted cost of work actually performed is a cost measure of how far along project work has progressed. At any particular date on the schedule, this figure can be compared to scheduled costs (i.e., the budgeted costs of work scheduled to be done by that date). This comparison will show, in dollar terms, how much *actual* project work is ahead or behind *scheduled* work. Although earned value analysis focuses only on the cost dimension of projects, it is a common method used to monitor complex projects. Cost deviations in actual versus budgeted costs or budgeted costs and scheduled costs serve as triggers for deeper investigations. The particulars of earned value analysis are beyond the scope of this chapter, but they are presented in more detail in Appendix B.

When project progress begins to slip, leaders need to consider at least four potential causes: project problems, deliverable problems, logistical problems, and staffing problems. **Project problems** generally reside in the project's organizational structure. One common problem is that the work breakdown structure failed to lay out the project's true work scope—the work that needed to be done. Another common project problem is poor scheduling of project staff.

Deliverable problems arise from the work on producing deliverables. Technical problems, for example, may take longer to solve than anticipated. Another example might be problems working with external stakeholders (e.g., auditees resisting audits or trainees not acquiring skills as quickly as anticipated).[14] **Logistical problems** occur when required resources are not getting to the right locations when needed (e.g., equipment, materials, or information).

Staffing problems are often problems of ability or commitment. Problems of ability lie in the required knowledge, skills, and abilities to do project work (e.g., lack of experience or adequate training). Problems of commitment are seen in terms of effort and time on task. Commitment problems can come from competing demands made on staff time, issues of morale, or

simply the personal choice of staff members not to participate at needed levels of performance.

When diagnosing the causes of project problems, leaders need to be aware of at least two common sources of error. The first is called **egocentric bias**. People generally attribute success to their own efforts and failure or problems to forces outside themselves. Leaders can encounter this bias when working with others to find the causes of project problems. The second source of error is **internal attribution bias**. Supervisors tend to attribute the source of performance problems internally to workers—to their abilities or their commitment—rather than to external factors beyond the workers' control (e.g., the flow of resources needed to do the work). Quite often, the real source of problems lies outside the immediate control of individual workers.

The focus of concern for the project leader, of course, is getting the project back on schedule. Immediate shifting of resources may be necessary, including personnel shifts and other resource reallocations. Once the project is back on track, however, the leader should carefully consider the true causes of the problem or the same kind of problem may arise again and again.

External Stakeholders

Project success greatly depends on how well project leaders deal with external stakeholders.[15] Here, we focus on four stakeholders who are particularly important to the execution stage of the project: clients, higher management, resource suppliers, and regulators.

Clients generally want to see the project proceed as planned. The extent to which they require communications varies. Some clients require quite frequent updating; others simply wait for the project's deliverables. Most clients, however, want at least some progress reports at critical junctures or milestones of the project.

Sometimes clients will want additional work to be done as they see new opportunities emerge in the project. Leaders need to be clear about the additional costs such work will require. Other times, projects encounter problems, and clients must be approached for additional resources or time. Project leaders need to anticipate the risks of these kinds of problems in the early planning stages of a project and clearly communicate those risks to clients. When problems do emerge, leaders need to give their clients as much advance notice as possible and convey concrete plans to minimize the adverse effects of those problems.

Managers in the host organization also want to see the project proceed as planned. At times, higher management may wish to move resources from a leader's project to use in other projects. Project leaders need to explain how

this will affect the project so that management can get a clear idea of the ramifications of its actions. Through all such negotiations with both clients and higher management, however, project leaders need to remember that keeping a good working relationship with them not only helps the project to move ahead but helps to retain support for the project as well.[16]

Projects often depend on getting resources from external suppliers and passing certain requirements by external regulators. Project leaders need to check with suppliers about the resources required before they are actually needed. The amount of lead time needed depends on how well each supplier has delivered in the past. New suppliers of critical resources should be carefully tracked. Required regulatory reviews also need close attention and careful preparation because certification is often critical to project progress. Remember, both suppliers and regulators are pulled in many different directions by demands of their own, and any particular project can drop from their attention. Project leaders should make sure that these external stakeholders are aware of the project schedule and its importance for project completion.

Project Closing

The **project closing** phase begins when the project begins with final project delivery and ends with a project review by the project leader working with a few critical stakeholders. The objectives are to close the project to the satisfaction of all critical stakeholders and to learn the important lessons the project has taught the project team.

The final phase of a project is typically hectic as the project staff hurry to complete final contract requirements. During this period, it is easy to forget important details and activities that are not directly and substantively related to the main project deliverables. When working with clients, a simple checklist is a very nice tool to make sure all the bases are covered in a project's closedown.[17] As the project nears the end of the execution phase, all project leads should produce checklists for their own areas as well. The entire staff should participate with the construction of these checklists to minimize the risk of things being forgotten. One area requiring particular attention—simply because it is so often overlooked—is the administrative side of the project. Reports often need to be produced, presentations given, payroll and budgets finalized for the host organization, signatures attained, and the like. Meeting with clients personally should be high on a project leader's list, to make sure that they are satisfied with the project's deliverables.

The final act of closing a project is an after-action review, completed when the project has effectively closed down. In the military, **after-action reviews** and reports are a principal means for institutional learning—to

make sure the lessons learned from the action can be applied in the future. Project leaders need to review the project once it has closed down to make sure they, too, have learned the lessons taught by the project.[18] When deciding who will participate in such a review, project leaders should make sure that the exercise remains a constructive one, not an opportunity to vent about problems. Leaders should choose participants who can offer candor, insight, and a wide range of perspectives but who are also committed to learning, not advancing other agendas.

After-action reviews can cover a wide range of topics. Broadly considering what was both successful and in need of future change can be a good start. Focusing on specific aspects of the project, including administrative and managerial issues as well as the technical work, can help confront issues normally overlooked. Reviewing how well different staff performed in the project can help leaders in their future recruiting. Also, reviewing relationships with important stakeholders—where things went well and where improvements might be made—can help attend to any leftover tensions as well as help leaders deal with them more effectively in the future.

PROJECT LEADERSHIP AND INDIVIDUAL PROJECT MEMBERS

One common characteristic of project work is that personnel often come and go throughout the project as needed. Some staff, of course, may come with the project's launch and leave only at the project's close. Others, however, are often needed for shorter periods during one project phase or another.

When project personnel first come on board a project, they embark on a job cycle of their own. Initially, they know relatively little about the project and what will be required of them. At these times, they tend to require a fair amount of leadership attention. Later, as they mature in their jobs, less attention is usually required.

Hersey, Blanchard, and Johnson's **Situational Leadership theory** offers project leaders some good ideas and practical advice about how to best lead individuals through this job cycle.[19] Their model is a stage model of leadership suggesting that project members mature in their jobs through four basic stages of development and that different kinds of leadership are needed at each stage. All new project members go through all stages development according to Hersey et al., but some, depending on their prior experience, develop through the stages more quickly.

The first stage of development is when members first join a project team. Hersey et al.[20] suggest that whenever someone new joins a project team,

he or she needs to be led with a more directive style of leadership. **Directive leadership** is characterized more by one-way communication from the leader to the team member. The goal of directive leadership when someone first joins the project team is to orient the new person to his or her role and getting performance up to speed as quickly as possible. It is also aimed at establishing the leader's authority—that he or she is in charge of the project. New project members tend to need this kind of direction, especially from a task point of view, but they tend to want it from a people point of view as well. Most new project members want to know what is required of them and to begin their work as soon as possible.

As people settle into their project jobs and become more productive, leaders are advised to discuss with them the rationale behind their jobs and the larger project picture within which their jobs fit—a kind of "**selling leadership**" behavior. This helps them mature more in their jobs by becoming more aware of how the project as a whole is organized and the role their work and the work of others play in it. This information empowers them with the knowledge to make more important project-related decisions.

The next shift in leadership is to allow workers who are more willing and able to accept job responsibilities to participate more in the project's decision making—**participative leadership**. As problems arise and choices need to be made, participation gives project personnel "on-the-job training" in how to make good job-related judgments and decisions.

Finally, the leader is advised to delegate project work entirely to those who demonstrate the ability and willingness to take it on—**delegative leadership**. Although leaders will certainly keep tabs on things, delegation shares the leadership function with those team members who are able to assume those responsibilities. This also allows project leaders to attend to the many other tasks that confront them.

It is easy to see the parallel between Hersey et al.'s[21] leadership model and our previous recommendations about project leadership and the project's life cycle. Similar parallels can be seen with the stages of team development covered in Chapter 6. Across all these discussions, different kinds of behaviors are suggested to help leaders attend to the constantly changing needs of the project, the project team, and its members.

SUMMARY

Although project leadership entails many demands, we focused on three clusters of them. The first was the roles leaders are expected to play in their position as project leader. The second was the different kinds of leadership

needed during the various stages of a project. The third was how best to lead individual project staff as they come and go on a project.

Project leaders are expected to play many roles external to their projects. Two are the roles of figurehead and spokesperson. As the figurehead, project leaders are expected to represent the project in all appropriate public functions, and they should be aware that their behavior and demeanor will reflect on their projects. As the project's figurehead, leaders are also expected to be the spokesperson for their projects. How well they present their projects to others will affect how well stakeholders think about their project and how well they think the project is being led. Project leaders also play liaison and monitor roles for their projects. Most formal business and informal contacts with the project are conducted through project leaders in their liaison role. Because project leaders are so involved with external stakeholders, they are uniquely positioned to monitor the project's environment to keep abreast of relevant project information. Project leaders are also expected to champion their projects to stakeholders in ways that get their projects the resources and support they need. Because of their positions, project leaders also generally play a key negotiating role, usually between clients, higher management, and the project team. Finally, clients and higher management expect project leaders to play a controller role for their projects. They are expected to keep the project moving forward as planned—staying on budget and on schedule. Leaders should handle the more routine problems in the context of the project. Larger problems should be brought to the attention of the appropriate stakeholder with plans for overcoming them.

Project leaders are also expected to play a variety of internal leadership roles for their project team. In their planning role, leaders are expected to take the lead on all project planning during the early stages of a project and whenever new plans are needed to adjust for project changes. Project leaders are also the key resource allocators for their projects, not only in project planning but in project execution as well. Project resources often have to be reallocated during a project, and the leader must take the lead in deciding those reallocations. Project leaders are also expected to coordinate project work and help solve problems. Coordination is an ongoing challenge in project work because a steady state is rarely achieved for long. Project leaders are also expected to take the lead in problem solving. Because projects are, by definition, unique endeavors, problems are expected. Technical and operational problems go with the territory, and project leaders need to empower their teams to solve them. The solution of technical problems may well lie outside the leader's area of expertise. Even so, all solutions that will affect the larger project need to be authorized by the leader. Finally, project

leaders also play a team leader role, which has both a task component and a social-psychological component.

By definition, roles are the expectations that others have of a role holder. Those expectations can vary across those who have them and, in the case of project leaders in particular, are often in conflict. Project leaders also have their preferences for how they would like to fill these expectations. It is important, then, for leaders to negotiate and clarify the role expectations stakeholders have of them.

All these project leadership requirements change depending on the stage of a project's life cycle. Leader involvement in the early initiation and planning stages of a project is important for at least two reasons: to help shape the project and to develop a deep understanding of it for future direction and control. The leader's first responsibility is to clarify the objectives and deliverables of a project. The next obligation is to make sure the project is doable—that the work scope, costs, and time allocations are realistic. These project parameters are best established by leaders in their role as project negotiators. Once a project's parameters are established, leaders turn to organizing their projects. The principal tools for organizing are the work breakdown structure and the project's schedule. Finally, the project leader needs to acquire and align project resources. The most important resource is the project team itself. The earlier leaders can begin assembling the key members of the project team, the better. Team members can assist in planning and, as a consequence, participate more fully in the project's launch. Earlier recruitment also increases the probability of getting qualified key personnel.

The project's launch is a particularly critical event in its life cycle. The short-term objective is to make sure project work is properly begun. The longer term objective is to lay the foundation so that project work can eventually be delegated to the project team during the project's execution phase. Leaders need to demonstrate their knowledge and command of the project during this critical period, and project teams expect them to do so. Summarizing the important objectives of the project, how they will be achieved, and who on the team is responsible for what aspects of the project can help achieve these objectives. Once work has begun on project tasks, leaders need to pay attention to both task and resource needs. Task attention focuses on whether project tasks have been initiated properly. Resource attention focuses on making sure resources are flowing as they should.

The primary leadership objective of project execution is to keep the project on track. First, leaders need to monitor the work of the project team. This should be done in a way that is neither too close—hurting good

performance—nor too loose—letting the project go off track before taking corrective action. Receiving concrete deliverables before too much time has passed in a project is a good method for keeping the project on track. Breaking down larger deliverables with longer delivery times into smaller, interim deliverables is one useful way of accomplishing this. Leaders monitor their projects by comparing what should have been accomplished to what actually has been. The project plan with its work breakdown structure, schedule, and project budget are all used as standards for comparison. Smaller projects might focus simply on deliverables—have they been produced on schedule and according to expectations? Larger projects usually need to monitor costs more carefully by comparing, for example, budgeted costs to actual costs of project work. Earned value analysis includes the time dimension by adding scheduled costs as a standard for assessment.

During the execution phase, leaders need to keep an eye out for any problems that might be emerging from within the project team. Leaders can look to four common sources of these internal project problems: project, deliverable, logistical, and staffing problems. An example of a project problem is that the work breakdown structure did not include required work. Deliverable problems emerge from the work itself, such as having to overcome technical difficulties. Logistical problems are generally tied to the lack of resources when they are needed. Staffing problems are principally problems of ability or commitment. Either the staff do not have the ability to perform the task given to them, or they lack the commitment to do so. Although the leader needs to get the project back on track as soon as possible, searching for the real cause of project problems will help keep them from emerging in the future.

Project leaders also need to track external stakeholders during the execution phase—success depends a great deal on them. Clients want to see the project proceed as planned and sometimes want additional work to be done. Higher management also wants to see the project proceed as planned and sometimes wishes to reallocate resources to other projects. When large problems emerge to threaten the project, leaders need to inform their clients and higher management of the problems and provide plans to resolve them. When clients or management want additional work or the reallocation of resources, leaders need to make very clear how these decisions will affect the project. Because projects depend on outside suppliers and regulators, leaders also need to make sure these stakeholders are well integrated into project plans as required.

When projects close, leaders need to make sure that all the products, services, and other outcomes of a project are delivered to the client. Checklists are good tools to use in this regard. Checklists are also useful

for making sure all requirements have been met with the host organization to close down the project. Finally, leaders should conduct after-action reviews to look back over the project to learn how to perform better in the future.

Just as the leadership needs for the project as a whole change as it goes through its life cycle, the leadership needs of project personnel change as well. At first, personnel need and generally want a more directive style of leadership to orient them to their job and to get them up to speed on project work. As they demonstrate their abilities to handle their jobs, the leader should spend more time letting them know how their work fits into the overall project and how the project as a whole is organized and led, using a more "selling" leadership style. This empowers the project member with the knowledge and information needed to begin making his or her own more important job-related decisions. Leadership should then shift to a more participatory style to further advance the member's job maturity in terms of being able to develop good project judgments and make good decisions about broader project issues. Finally, leaders should shift to delegating more responsibility to team members who show the ability and willingness to accept leadership responsibilities. At that point, leaders can turn their attention to other project tasks.

REVIEW QUESTIONS

1. Define and identify the expectations of the following roles of a project leader:
   a. Liaison and monitor
   b. Champion
   c. Controller
   d. Planner and resource allocator
   e. Team leader
2. Why should a project leader clarify his or her leadership role?
   a. How should he or she go about doing so?
3. Discuss the various leadership requirements in the following stages of the project's life cycle:
   a. Initiation and planning
   b. Project launch
   c. Project execution
   d. Project closing

EXERCISES

1. Review the various roles project leaders are called on to play.
   a. Assess your strengths and weaknesses for each of them.
   b. For those roles in which you are not strong, how would you address them in any given project?
2. Identify a project of your own choosing.
   a. Lay out a plan for its initiation and planning.
3. Recall a school or work project that you have recently completed.
   a. Conduct an after-action review of the project.
   b. How would you do things differently if you were the project leader (again)? In addressing this question, review and comment on what occurred in the project as it moved through its various project stages.

ENDNOTES

1. Mintzberg, H. (1973). *The nature of managerial work*. New York, NY: Harper & Row.

2. Luthans, F., & Lockwood, D. L. (1984). Toward an observation system for measuring leader behavior in natural settings. In J. G. Hunt, D. Hosking, C. A. Schriesheim, & R. Stewart (Eds.), *Leaders and managers: International perspectives on managerial behavior and leadership* (pp. 117–141). New York, NY: Pergamon.

3. It is also important for external stakeholders to get a consistent message about the project. For this reason, external communications are often restricted to the project leader. If other project members are required to interact with external stakeholders, it is important that the project leader be present if possible or thoroughly debriefed if not.

4. Often, team members will work with external stakeholders as well. It is important in these interactions that the project leader is kept thoroughly informed of important project business.

5. An excellent source for negotiation is: Fisher, R., Ury, W., & Patton, B. (1991). *Getting to yes: Negotiating agreement without giving in*. New York, NY: Penguin Books.

6. The explanations leaders give followers for their decisions have been well researched in the organizational justice literature. Laying out the causes that required the change and the project goals that will be addressed by the change can help dampen the disappointment and anger team members may have about the change. It may be that such accounts cannot be given immediately, but leaders should remember to give them as soon as possible.

7. Meetings, of course, are legitimate project activities to the extent they add value to the project over and above the costs of those who must attend them. Project leaders are expected to weigh those costs and benefits carefully.

8. For further discussion, see Jehn, K. A., & Bendersky, C. (2003). Intragroup conflict in organizations: A contingency perspective on the conflict-outcome relationship. In R. M. Kramer & B. M. Staw (Eds.), *Research in organizational behavior* (Vol. 25, pp. 187–242). Kindlington, UK: Elsevier Ltd.

9. There is an old management dictum that when more than one person has responsibility for a task, no one has responsibility for it. Although project work often requires the efforts of many, one person needs to be accountable for getting the task done.

10. The working assumption here is that a project's launch occurs with the entire team all at once. In many projects, team members join the project in different phases. The project needs to be launched to newcomers as they arrive—providing them the information they need and making sure initial work is proceeding as planned.

11. Quite often, concerns of project members are not raised in this early stage of project work. As the team moves into its storming stage, however, more concerns and disagreements about the rationale behind project issues may arise (see Chapter 6). Project leaders should not necessarily take this as insubordination but as legitimate participation over valid concerns that need to be addressed. This is often best done one-on-one.

12. Fiedler, F. E. (1967). *A theory of leadership effectiveness*. New York, NY: McGraw-Hill.

13. One rule of thumb might be the "80-hour" rule: no more than 80 hours of work (2 weeks) should pass before something concrete is delivered from a task package.

14. These kinds of problems need to be anticipated as sources of project risk early in planning and clearly communicated to clients and higher management. For more on this and other potential project problems, see Chapter 5 on the management of project risk.

15. Ancona, D. G., & Caldwell, D. (1992). Bridging the boundary: External activity and performance in organizational teams. *Administrative Science Quarterly*, *37*, 634–665.

16. An excellent source for client and higher-management negotiations is Fisher et al. (1991).

17. Building contractors often use a punch list to finish off their projects. They get together with their clients to review the property and, together, negotiate a list of final things that need to be done to finish the job. The company of a project manager I know does something similar. Managers do a computer word search for all elements of their contracts that have the phrases "The company will" or "The company shall...." These phrases were placed in the contract specifying deliverables, and the word search constructs a check-off list for them.

18. As mentioned previously, lessons are really learned throughout the project and should be used as they are acquired. After-action reviews, however, offer the opportunity to wrap them up given the full advantages of hindsight.
19. Hersey, P., Blanchard, K. H., & Johnson, D. E. (1996). *Management of organization behavior: Utilizing human resources* (7th ed.). Englewood Cliffs, NJ: Prentice Hall. Their ideas are abstracted here and adjusted for project leadership needs.
20. Hersey et al. (1996).
21. Hersey et al. (1996).

KEY TERMS

After-Action Review: a report used principally for institutional learning, to make sure the lessons learned from the project can be applied in the future.

Champion: the role project leaders play when they promote the benefits and needs of their projects in terms that speak to stakeholder interests.

Chief Negotiator: the role project leaders play when they negotiate what a project is to produce and the resources required to produce it.

Controller: the role project leaders play when they make sure the project is proceeding as planned—producing deliverables according to specifications, on budget, and on schedule.

Coordinator: the role project leaders play when they ensure that the project team is working together toward common project objectives.

Delegative Leadership: leadership behavior characterized by delegating the project job to the team member entirely—although periodic checks on performance are made. This leadership style is appropriate for those workers who can handle delegation in terms of their ability and willingness to do the job on their own. The goal is to share the leadership function with those who are able to assume those responsibilities.

Deliverable Problems: problems that arise from the work in producing deliverables.

Directive Leadership: leadership behavior characterized by one-way communication from the leader to the team member. A leadership style used for new project members. The goal is to orient the new member to the job and get him or her up to speed as quickly as possible.

Egocentric Bias: the tendency for people to attribute success to their own efforts and failure or problems to forces outside themselves.

Figurehead: the role project leaders play when they represent their projects at public functions.

Internal Attribution Bias: the tendency for supervisors to attribute the source of performance problems internally to workers—to their abilities or their commitment—rather than to external factors beyond the worker's control.

Liaison: the role project leaders play when they are called on to do business with, and develop informal ties to, stakeholders.

Logistical Problems: problems in getting required resources to the right locations when needed.

Monitor: the role project leaders play when they monitor the project environment for information important to the project.

Participative Leadership: leadership behavior characterized by allowing a team member to participate in the decision-making requirements of the project that would concern him or her. This leadership style is appropriate for those team members who are more willing and able to accept responsibility for their jobs. The aim is to provide a kind of "on-the-job training" on how to make good judgments and decisions.

Personnel Problems: problems of ability or commitment among project staff.

Planner: the role project leaders play when they take the lead in all project planning.

Problem Solver: the role project leaders play as the person ultimately responsible for solving project problems.

Project Closing: the stage of the project that begins with final delivery and ends with a project review.

Project Execution: the stage of the project when project work has been fully delegated to the project team, and project members have settled into producing the project's deliverables. It ends at project closing.

Project Initiation and Planning: the stage of the project from when work first begins on the client's project to when the leader finishes planning and organizing the project.

Project Launch: the stage of the project when the leader initiates the execution of project work with the project team.

Project Monitoring: the practice of comparing what has been accomplished to what should have been accomplished by a certain time.

Project Problems: problems that come from the project itself. Often these problems are in the project's organizational structure.

Resource Allocator: the role project leaders play when they address the distribution of resources in project planning and execution.

Selling Leadership: leadership behavior characterized by more open communication between the leader and the team member. A leadership style used after project members have developed the ability to do their jobs as assigned. The goal is to help the project member develop by explaining the rationale behind why the project job is structured the way it is.

Situational Leadership Theory: Hersey, Blanchard, and Johnson's stage model of leadership suggesting that project members mature in their jobs through various stages and that different kinds of leadership are needed at each stage.

Spokesperson: the role project leaders play when they act as the primary representative of the project, such as giving formal presentations to important stakeholder groups and individuals.

Team Leader: the role project leaders play when they take the lead in all the major task decisions of the project as well as the social-psychological ones such as motivation, discipline, and conflict resolution.