

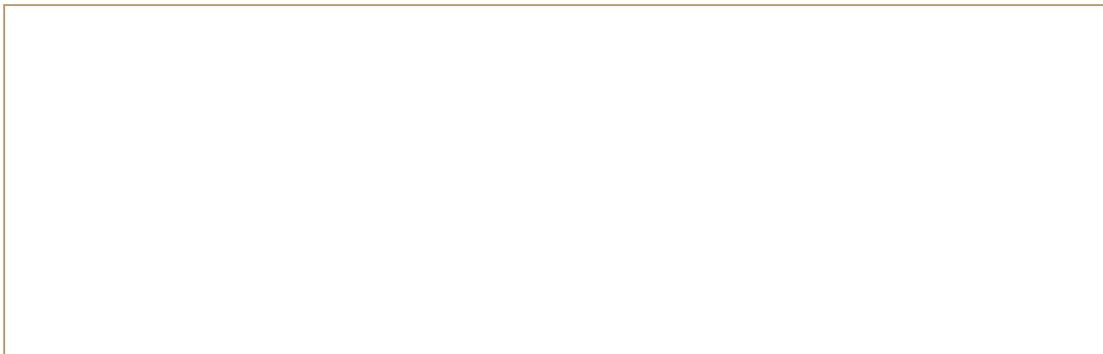


مركز الملك حمد العالمي للتعايش والتسامح  
King Hamad Global Center for Coexistence and Tolerance



# Leadership for Coexistence Programme Capstone Project Planning

## Participant Booklet



# Contents

Starting activity .....	3
Case Studies for Inspiration .....	5
Choosing a Project .....	7
Project Management	
Overview .....	18
1) Defining the Project .....	20
2) Identifying the Tasks .....	30
3) Estimation of the Tasks .....	33
4) Critical Path .....	35
5) Schedule Compression .....	37
6) Gantt Chart .....	39
7) Resource Planning .....	44
8) Risk Analysis .....	48
Reconfirming The Project .....	50
9) Monitoring Progress .....	52
10) Monitoring the Finances .....	61
11) Rescheduling .....	62
12) Review the Project .....	63
Stakeholder Mapping for your Project .....	71
Being a Trustworthy Leader .....	74
Team Activity .....	83
The Working Genius Model of Personality .....	84

# Starting Activity

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**What was your score?**

**What did this activity show you about planning projects?**

Planning and delivering a project requires many skills – but the starting point is to ‘begin with the goal in mind’. This means knowing what you want to achieve. Getting clear on your goals helps you to:

- Understand why something is important to you
- Define your own success
- Be able to measure your progress against that success
- Develop a project plan that helps you to work towards your specific goals

Remember – sometimes people change their goals part way through a project. They may make the goal bigger or smaller or find a completely new area of passion. That is ok as long as you define your new goal to work towards.

**Your capstone project will ideally have a goal related to coexistence – helping groups of diverse people to exist and live together peacefully whilst respecting their differences.**

# Case Studies for Inspiration

We are going to watch clips from a documentary “Social Enterprising the Transitions Ahead”<sup>1</sup> It explores the experiences and journeys of different Social Enterprises in the City of Sheffield in the UK. A social enterprise is a type of organisation that sits between a charity and a company.

**Companies** are set up with directors and shareholders and their usual aim is to make a profit for those shareholders by providing a commercial product or service.

**Charities** are set up by trustees who will determine the ‘charitable purpose’ that they aim to meet. They are run for the benefit of a particular social group and usually rely on grants or donations in order to meet their running costs.

**Social enterprises** are run like a business because they create products or services which make money to run the organisation. However, they are also like a charity because those products or services meet a need for a particular social group.

The documentary may help to illustrate

- the kinds of projects that community groups may set up
- tips and advice on running a community project
- how effective projects are interdependent with other experts and services

## Clip 1) What are your insights from the interview with the Green Estates?

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<sup>1</sup> Opus Independents and Sheffield Social Enterprise Network (2025) Social Enterprising the Transitions Ahead. <https://vimeo.com/1056700378/ef70bbe4f8?ts=0&share=copy> Accessed 09/06/25

**Clip 2) What are your insights from the interview with the Foodworks?**

**Clip 3) What are your insights from the interview with Opus Independents and Terry's closing reflections?**

# Choosing a Project

When choosing your Capstone Project topic, it is important that you find a topic that you are both passionate about and that serves a purpose in the community (ideally to support coexistence). The following pages contain some tools and models to get you thinking about how to identify both passion and purpose.

On Module 2 we looked at the Inner Development Goals<sup>2</sup> - a framework of 23 capacities which we are all capable of – but we can learn to develop and express them more fully. The capacities are sorted into 5 dimensions:



All of the five dimensions deal with inner skills and capacities, but you can see how **being** is the ‘most inner’ whereas **acting** is more concerned with bringing change to the outside world. Each of these categories, as well as the capacities within them, can help us to design and deliver great projects.

1. **Being** – knowing your inner passions, values and what topics you care about in order to choose a project
2. **Thinking** – Identifying the problem you are addressing, the wider system your topic sits in, planning the project goals and process
3. **Relating** – building a team to help you deliver the project, empathising with stakeholders and networking to promote your work
4. **Collaborating** – working effectively with others to create ideas, plan action and delegate work (these may be in your team or outside of your team)
5. **Acting** – delivering a project which makes an impact. Doing the hands on work.

We are all better at expressing some capacities over others – which is why it can be helpful to work in groups or build teams so that each person can bring their own strengths to the project.

<sup>2</sup> Ankrah, D., Bristow, J., Hires, D., & Artem Henriksson, J. (2023). Inner Development Goals: from inner growth to outer change. Field Actions Science Reports. *The journal of field actions, (Special Issue 25)*, 82-87.

## Finding Ikigai

Ikigai is Japanese concept which comes from two words 'Iki' meaning life and 'Gai' meaning value or worth. This translates roughly as a life purpose, reason for being or the thing that you live for. Many writers on the subject of Ikigai suggest that we are all gifted with a purpose and that a challenge of life is to 'discover' it – meaning that we already have one and that self-reflection and a wide range of experiences will help to reveal it to us. This may also help you to uncover a project area that matters to you.

The main approach to finding your Ikigai (purpose) is to work through four questions and look for any activities that apply to **all** four areas of your life.

**What do I love doing?**  
**What does the world need?**  
**What am I good at?**  
**What can I be rewarded for?** (some models ask 'what can I be paid for' instead of rewarded for)



When using the Ikigai questions to choose a career, many people start by asking what they can be paid for. However, it can be more fulfilling to start by asking what the world needs first. After all, if the world or society needs something, then there is a good chance that someone is willing to pay for it / fund it.

The world needs many things and your project will not be able to address everything. So it's useful to narrow it down to causes that you deeply care about. Dr Scilla Ellworthy<sup>3</sup> notes that anger can be destructive or it can be used to fuel our passions and drive us towards action. She also touches on purpose in her book:

*"1) **What breaks your heart?** It could be wounded animals, bullying on the internet, or refugees...*

*2) **What are your skills?** Do you like gathering information? Are you good at writing? Are you a creative?*

*Now can you marry the two?"*

There is a careful balance here in finding something you care about enough to drive and motivate you, whilst not feeling burdened by the 'need' to solve a large societal problem on your own. Instead, it is better to see yourself as contributing towards progress in a particular area rather than entirely solving something.

Another framework for identifying what the world needs is the Sustainable Development Goals<sup>4</sup> (SDGs for short). These are 17 goals for governments, businesses and charities to work towards by 2030 to secure the future of the planet and healthy societies. Each of these may help you to identify an area that you are passionate about.



<sup>3</sup> Ellworthy, S. (2020). *The mighty heart: How to transform conflict*. Peace Direct.

<sup>4</sup> Sustainable Development Goals. *United Nations*. <https://sdgs.un.org/goals> accessed 12/06/2025

**1) What does the world need?**

- **What services or products would help people and the planet (to be in coexistence)?**
- **Which Sustainable Development Goals do you most care about?**
- **What makes you angry?**
- **What breaks your heart?**
- **What do you see that people around you are missing?**
- **What would make people's live better, more fun, safer, healthier etc**

**2) What do you love doing?**

- **How do you most like to spend your time?**
- **What hobbies, activities or events do you enjoy?**
- **What do you never get bored of?**
- **What is something that you are always drawn back to doing?**
- **What gets you into a state of flow? (Concentration, time flies by)**

**3) What are you good at?**

- **What knowledge and technical skills do you have?**
- **What social skills do you have?**
- **What are your best expressed Inner Development Capacities?**
- **What do people come to you for help with?**
- **What comes easily to you?**

**4) What can you be rewarded for?**

- **What paid roles are there?**
- **What funding / grants are available?**
- **What valuable services or products would people in the community be willing to pay for?**

Once you have brainstormed your answers to the four questions, you should be able to place them into an Ikigai Venn Diagram (on the next page). Do some of your answers address multiple parts of the Venn Diagram?

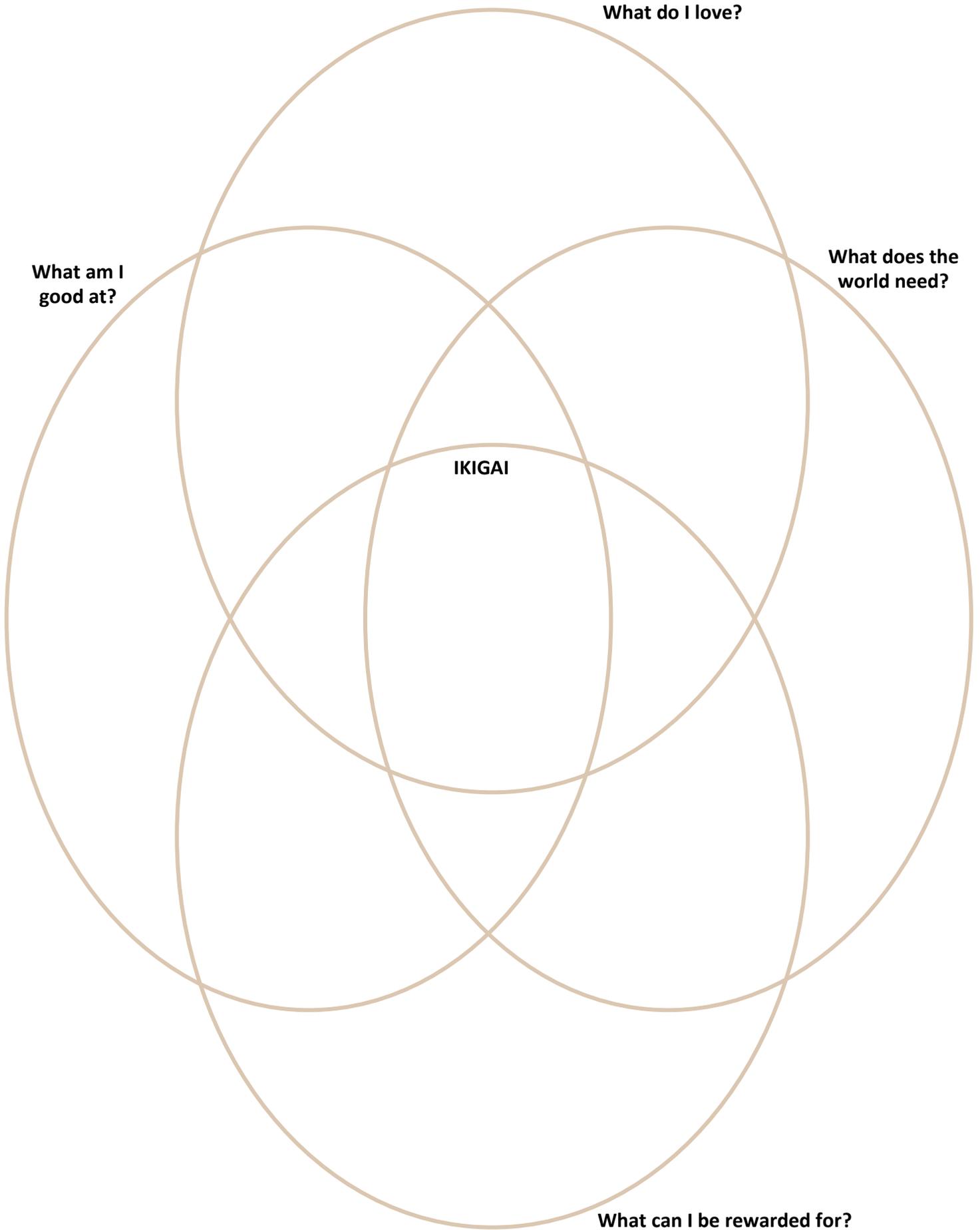
**Does any one activity complete all four areas? If so, congratulations you have found your Ikigai!**

If not, don't worry. It may be that you have separate activities fulfilling different parts of your life. You may have a paid job which challenges you and a volunteering role which you love and helps the world. Happier people tend to spread their time to make sure that all four areas are being taken care of each week (or even each day!).

Sometimes activities can 'grow into' other hoops. For examples you may learn to love or take pleasure from something that you didn't like at first. Or you may have a hobby that as you get more skilled at, you can eventually be paid for. Setting a goal to move an activity into more of the hoops is another great way to improve your Ikigai.

- How can you spend your time to make sure that all four key areas are addressed in your life?
- Which activities can you expand to cover more hoops?
- How could you do this?
- What resources, skills or support might you need?
- What are the steps?

**What is your main idea for a Capstone project? Can you summarise in a sentence or two?**



## Tips on Ikigai and Leadership

It is often important to understand an organisation's purpose in the context of the leader who founded it – personal purpose and organisational purpose are often interlinked. The leader at the top of an organisation or project may set the overall culture and so understanding what they are aiming for supports visionary leadership and teamwork.

### **The benefits of Ikigai as a leader**

If you are able to spend the majority of your work time doing something that you love, you are good at, the world needs and that rewards you, then you are likely to experience the following benefits:

- You have more energy, passion and motivation for the work
- You are more likely to achieve flow (a state of concentration)
- The work may be sustainable because of the ongoing need for it
- You are more resilient in the face of challenge because the drive to fulfil a need motivates you to overcome those challenges
- You will push yourself to learn and experience more to serve the sense of purpose
- You will be able to demonstrate dedication to a mission / vision
- You will work with a sense of integrity which may attract followers

### **Developing ikigai in an organisation or team**

As the leader of a team or organisation it is important that you have your own sense of purpose in order to stay motivated and resilient. It is also essential to try and help others within your organisation develop their own sense of purpose so that they will be more effective and fulfilled. This can sometimes be a difficult challenge as people in your team may just be 'doing a job' to pay the bills, or not share the same passions as you – which can be a source of tension that needs to be handled with emotional intelligence.

The four aspects of Ikigai can provide a useful framework for leaders to follow when supporting teams.

#### **What do your team love?**

- **Talk about meaning** – ask your team members what drew them to the project or role? Is it the work itself? The social interactions? The client group? Identifying what people like about the job allows you to nourish that area to create even greater satisfaction.
- **Encourage a culture of sharing** – getting team members to tell each other (and maybe even stakeholder) what they love about their work can be an excellent way to increase enjoyment, pride and maybe even do a bit of positive public relations along the way.
- **Help your team to love the mundane** – there may be parts of the job that aren't so exciting but are important and necessary (think doing the laundry, filing, logging expenses). The mundane moments can give us an opportunity to get mindful and enjoy being present – which is great for our mental health. Also, you may be able to help the team learn to love those under appreciated tasks because they all add up to the organisation fulfilling its purpose.

## What are your team good at?

- **Consider your hiring process** – most organisations hire people with particular skills and talents so that they can hit the ground running. However, it's sometimes worth holding back and hiring someone less experienced but who meets other criteria (values, passion, attitude) and then taking the time to train them up so that they become good at the job later.
- **Stretch your team** – there is a fine balance here between challenge and competence. If a task is too easy because your team are already skilled, this could create boredom. If a team is overwhelmed and too far out of their comfort zone then this can create anxiety and pressure. Leaders must pay attention to people's skills, knowledge and tasks to hit the sweet spot: where team members feel slightly stretched but that their skills are being utilised well.
- **Provide training** – this is the easiest part of Ikigai for leaders to take action on. Providing training, shadowing, mentoring, courses and coaching ensures that people develop and hone their skills so that they feel they are good at the task in hand.
- **Value the 'other' skills and talents** – there can be a tendency for leaders to only focus on the skills, knowledge and talents that relate to the role. However, your team members have a wealth of expertise outside of work that add value to your team. Who do people go to when the need cheering up? Event planning? Serious advice? Take note of people's non-work skills and make sure to celebrate them and maybe even bring them into projects.

## What does the world need?

- **Clear vision** – your organization may not be helping the **whole** world but make sure your team knows who your product / service does benefit and how. Is it that you're benefiting one stakeholder at a time by solving their issue? Are you providing a product or service that people enjoy? Emphasise the impact that your team's work is having. The more they can recognise how they are meeting people's needs, the greater fulfilment they'll get.
- **Share feedback** – make sure that you get feedback from stakeholders to pass on to the team. This allows them to see the benefits their work has as well as identifies further needs and improvements that you can focus on.

## How can people be rewarded?

- **Living wages** – the most obvious step here is to ensure that your team members are being paid well enough to live a healthy and comfortable lifestyle.
- **Praise** – being rewarded doesn't always mean financial payment. Celebrate people's contributions, effort and achievements. Let people know how much you value them. You'll find that this increases engagement and maybe even love for the job.
- **Time** – some organizations now reward people with time off to volunteer on things that they care about, to work on other projects or spend time with family. Time is a valuable resource that your people will appreciate.
- **Flexible benefits** – this could include a whole array of things such as training packages, social events, perk schemes, memberships etc. It is important to check with your team what they would actually find rewarding before heading down this route.

# Project Management - Overview

The Project Management Institute defines a project as:

***“a temporary endeavour undertaken to create a unique product, service or result.”***<sup>5</sup>

This recognises that most projects have a finite start and end, unlike typical ongoing employment. They also seek to achieve something specific which may be defined internally or come from an outside source such as customer requests, governmental requirements or other stakeholder suggestions.

Most small projects undertaken within organisations are done by an individual or team who still have other employment commitments. This means that they must manage their project timeline and resources alongside their other work. More complex projects often have dedicated staff who are hired solely for the fulfilment of that contract.

Project Management is a complex industry – there are a great number of qualifications, strategies, reading materials and experts discussing the dos and don'ts of project management. But it is very important to recognise that the skills of project management can, and probably are, practiced and applied very easily in daily life.

For example: selling a house, renovating a space, planning a holiday, arranging a birthday party, running a community project or even planning family meals for a week.



Many Project Management models identify 5 key **phases** of any project:

1. **Initiating** – recognising the need for a project
2. **Planning** – outlining all of the tasks, responsibilities and timescales
3. **Execution** – kicking off the project and following the plan
4. **Monitoring** – continuous evaluation against the plan and KPIs, making changes if needed based on time/finance/quality targets
5. **Closure** – celebrating the finish, evaluating the outcome, sometimes handing over.

Within each of these phases are a number of possible steps and models to consider, depending on the complexity and scale of the project.

<sup>5</sup> Project Management Institute. <https://www.pmi.org/about/what-is-project-management> Accessed 12/06/25

The Association of Project Managers has published a Body of Knowledge which is used in their Project Management Qualification process. This extensive book can be summarised into 12 key steps involved in managing any project. More complex projects still follow these steps, but need much more input on leadership, management systems, team dynamics and tracking tools to aid a smooth project delivery. The length of time spent on each stage depends on the complexity of the project. Each stage acts as a set of things to consider to ensure that the project runs as smoothly as possible.

### APM 12 Steps of Project Management: <sup>6</sup>

Step	Overview
<b>1) Defining</b>	Work with stakeholders to agree on the goals of the project. Factor in the quality, time and cost budgets. Agree the project goals in writing.
<b>2) Identify Tasks</b>	Identify all of the parts of completing the project. This may be structured into groups of task or types of task.
<b>3) Estimation</b>	For each task estimate the time needed and costs required. Estimations should be generous to allow for issues later.
<b>4) Critical Path</b>	Create a flow diagram or 'network path' showing the essential order of those tasks and 'floating' tasks that can be completed more flexibly.
<b>5) Schedule Compression</b>	This means saving time by making the critical path shorter if needed to meet the project goals. This usually involves reducing quality, increasing costs or doing tasks in parallel.
<b>6) Gantt Chart</b>	A finalised project management chart showing the timeline and who is responsible for each task.
<b>7) Resourcing</b>	Using the Gantt chart to identify when resources are needed (people, spaces, expertise, spending etc). Floating tasks may be moved to ease resourcing.
<b>8) Risk</b>	Identify things that could go wrong, their likelihood and their impact on the project. Use this to plan contingencies.
<b>Re-Confirm</b>	Now that the project has been fully costed, timetabled and confirmed, check it with stakeholders before proceeding.
<b>9) Monitoring Progress</b>	Managing the team to ensure the Gantt chart is followed on time. Meetings to check in and set action points. Continuous risk assessment.
<b>10) Monitoring Finance</b>	Reviewing spending against the projections. This may feed into step 11 if you recognise an overspend.
<b>11) Rescheduling</b>	Making change requests if you foresee the project taking longer, costing more or needing to be lower quality.
<b>12) Close and Review</b>	Evaluating the project at the end to act as a learning tool for the team, stakeholders and perhaps other industry workers. Celebrating the positives.

<sup>6</sup> Association for Project Management (APM) Body of Knowledge (BoK) 7th edition", APM Publications, 2019, ISBN 978-1-903494-82-0.

# Project Management 1 – Defining the Project

Projects can be started by the project manager or the team themselves (we need a new menu for the restaurant, our community would benefit from X workshops) or by external stakeholders (can you build me a conservatory?) It is important that wherever a project comes from, it is clearly defined. This helps:

- To create a more specific project plan
- To ensure the purpose and outcomes are clear
- To inspire people towards a common goal or vision

## Consult the Stakeholders

**Stakeholders** – any individuals that are involved or affected by the project or whom could have an impact on the project. This may include customers / service users, other staff members, members of the public, legislators, community members and more.

As you identify the need for a project it is important to consult with all of the key stakeholders to ensure that you understand what is important to them in this project. This may include meetings, interviews or surveys to hear everyone's views.

**Who are the stakeholders in your Capstone project?**

**Which ones will have the most influence on your project planning and decision making?**

**How will you consult with them / get their views?**



## Identify the Purpose

Simon Sinek<sup>7</sup> famously says that great leaders always start with why. He identified that in any project, company or service you can identify three strands:

**What** – the product, the project, the service  
**How** – the approach, the unique selling point  
**Why** – the underlying ethos or purpose

He made the point that the most effective and persuasive companies started by communicating **why** they do things, rather than what they do, as the why leads to emotional engagement in the process. This is also very similar to Marshal Ganz's<sup>8</sup> public narrative approach which helps leaders to focus on **why** they are called to serve.

If you are the one designing a project then you need to be very clear on why you are doing it – what purpose it serves.

If you have been asked to carry out a project by a stakeholder then it is important to take the time to find out why they want it. Many stakeholders will tell you the 'what' they want you to do but if you don't understand why then you might not actually meet their needs:

<b>What:</b>	I want you to build a garage for my house
<b>Possible whys:</b>	Feeling my car is secure Decluttering the house by having a storage space Extra room for the kids to play Freedom to complete art projects Investing in the property for resale later

Each of these 'whys' create a very different context for the project and will guide the types of tasks needed to make the project successful. They can also open up different creative routes to solving the problem.

Use questioning with your stakeholders to make sure that you understand:

- What current challenges are you facing that led to this project?
- What is the main purpose of your project?
- How will this project make your life / organisation better?
- Are there other things you could try (or have tried) to achieve the same purpose?

<sup>7</sup> Sinek, S. How great leaders inspire action [https://www.youtube.com/watch?v=u4ZoJKF\\_VuA&t](https://www.youtube.com/watch?v=u4ZoJKF_VuA&t) Accessed 12/06/25

<sup>8</sup> Ganz, M. (2010). Leading change. Leadership, organization and social movements. In N. Nohria, R. Khurana, & N. Anand (Eds.), *Handbook of leadership theory and practice* (19, pp. 1-10). Harvard Business School Press.

## Identify the Features and Benefits of your Project

**The Features** of a project / service / campaign are the facts or specifications about it. They explain what it is, how it works and even finer details like price and time scales. When people have spent a long time working on a project they tend to focus their communication on the features.

**The Benefits** of a project / service / campaign emphasise how it will make the individual's life better. It answers the question 'why should I care?' or 'What impact does this have?' This appeals more directly to people emotions and is often the thing that motivates them to commit or get involved. This approach may tap into people's needs, wants, lifestyle or sense of self.

This table outlines the differences between features and benefits:

Features	Benefits
<ul style="list-style-type: none"> <li>• What is the project?</li> <li>• How does it work?</li> <li>• What are the details? - time, cost, resources</li> </ul>	<ul style="list-style-type: none"> <li>• What is the positive impact?</li> <li>• How will it make people's lives better?</li> <li>• What good results will happen?</li> </ul>
<p>Faith in Leadership Example: We provide four modules of leadership content for cohorts of 30 participants. We cover topics such as personality types, communication skills and conflict resolution. Participants attend in person training from 10-6 with a team of staff and mentors.</p>	<p>Faith in Leadership Example: We empower young people of faith to see themselves as leaders. By developing deep level skills, our participants are able to confidently navigate challenges in the workplaces, studies and communities in order to be a force for social good. Our programme is a catalyst for social change.</p>

When managing a project, it important to be aware of both aspects. You will use the features to explain that what, where and how – to set the timelines, organise the details and hold people accountable during implementation. The benefits will be more useful when communicating with stakeholders about the importance of the project, the intended outcomes and when trying to motivate people to support your or carry out the work.

What are the features of your project?	What are the benefits?

## The FAB technique

If you do want to talk about the features of a project / product / campaign then the FAB model can help you to connect each feature to the key message you want to convey.

Feature	Advantage	Benefits
What feature?	Why is that feature useful?	How does it lead to a benefit?
Our programme is staffed by a team of alumni	They have experienced the programme before	They make compassionate mentors and inspirational peer role models
The laptop charges fully in 1 hour	You don't need to wait for long	You can be mobile and fast moving
The packaging is biodegradable	It won't leave a large carbon footprint	You feel good for making a sustainable / ethical choice

When presenting to stakeholders you may say:

*“The programme is staffed by a team of alumni who have been through the programme and experienced their own personal change. This makes them compassionate mentors to new participants as well as inspiring young role models that participants can relate to.”*

Brainstorming the features, advantages and benefits of your project can help you pick out the key messages you will include when speaking to stakeholders.

Feature	Advantage	Benefits
What feature?	Why is that feature useful?	How does it lead to a benefit?

## Persuading stakeholders

When you want to persuade someone, you have to pace them – take them on your idea journey at the correct speed for them. Communication that pressures people can work in the short term (donate to my project, use my service) but people are much more convinced when they can be reached through storytelling. This means that you will have longer lasting support for your cause and may even get behaviour change and word of mouth recommendations.

Storytelling is about giving people a beginning – middle – end structure to follow. This may create suspense, engage people’s feelings and give the final message more impact. The five-step model below helps you to organise your ideas into a story.

Section	Meaning	Purpose
<b>Background</b>	Who is the target audience? What is their context?	Shows that you understand who you are speaking to. You may have to tailor your message to different people.
<b>Problem</b>	What issue are they facing?	Shows that you have recognised their pain / struggle / inconvenience.
<b>Consequences</b>	What will happen if things don’t change? What is the negative impact?	Creates a small amount of fear, suspense or discomfort that motivates people to listen to your solution.
<b>Solution (FEATURES)</b>	What can you do to fix their problem?	Presents your idea / action / solution
<b>Reward (BENEFITS)</b>	What will happen if things do change? What is the positive impact?	Creates hope, excitement and positive motivation that your idea is a good one.

Parts of this framework may feel familiar from public narrative and motivational language. It can be used to pull together ideas and create a short but powerful story to persuade others. Here is a Faith in Leadership example.

Section	Example
<b>Background</b>	You are all people of faith who are painfully aware of the rise in divisions between people in the diverse societies in which we live.
<b>Problem</b>	We see so many troubling examples of political, media and business leaders who fuel these divisions for their own gains and therefore widen these divides.
<b>Consequences</b>	Without good leadership, this may continue to the point where we see segregation, violence or even war.
<b>Solution (FEATURES)</b>	Which is why our training programme, leadership for coexistence, empowers young professionals from faith backgrounds with the skills needed for inclusive and positive leadership in their communities.
<b>Reward (BENEFITS)</b>	Investing in the next generation of leaders means that when they are in their businesses, charities, political organisations and the community, they will show that there is a better way – bringing people together and creating nurturing spaces for people from all backgrounds to celebrate their common humanity.

Imagine you are speaking to a group of stakeholders about your Capstone Project. Make notes on the five stages of the persuasive framework to help you plan how you might communicate about your project.

Remember that you may change your communication slightly depending on who you are talking to – you may have a different focus for funders compared to service users.

Section	Your Notes
<b>Background</b>	
<b>Problem</b>	
<b>Consequences</b>	
<b>Solution (FEATURES)</b>	
<b>Reward (BENEFITS)</b>	

## Defining your project with SMART goals

This model (which varies from version to version) is regularly used in project management to help people define the scope and timing of their project. This will be useful for drawing up a detailed project plan. Each letter of SMART stands for something that you should consider in your project:

- Specific** – focusing on key features / outcomes / requirements
- Measurable** – you can quantify what success looks like (end result or process).
- Attainable** – it is realistic; you have the skills, resources and time to do it.
- Relevant** – it has a sensible purpose related to other goals and priorities.
- Time Bound** – it has a deadline or milestones to help you track progress

When working with stakeholders or team members to define a project, asking SMART questions can help you to define the project details.

Aspect	Questions
<b>Specific</b>	<ul style="list-style-type: none"> <li>• What is your goal / project? How do you plan to achieve it?</li> <li>• What are the different parts of the goal / project?</li> <li>• You have mentioned a few different priorities. Which one will you focus on first?</li> <li>• Which goal / area will make the biggest difference to you?</li> <li>• What problem / issue will your project address?</li> </ul>
<b>Measurable</b>	<ul style="list-style-type: none"> <li>• How will you know when you have achieved the project goals?</li> <li>• What would a successful outcome be for you?</li> <li>• If you are trying to make something ‘better’ then what does better mean to you?</li> <li>• What is the minimum amount you could achieve on this project to make a difference? What is the ideal amount? The maximum?</li> <li>• How will you evaluate the impact / outcome of this project?</li> </ul>
<b>Achievable</b>	<ul style="list-style-type: none"> <li>• How are you making sure this project is realistic?</li> <li>• What will you need? – time? Resources? People? Skills?</li> <li>• Do you already have those things or will you need to find them?</li> <li>• How will this project fit in with your existing commitments? Time? Finance?</li> </ul>
<b>Relevant</b>	<ul style="list-style-type: none"> <li>• What does this project mean to you?</li> <li>• What does this project mean to your other stakeholders?</li> <li>• How will this project improve your current situation?</li> <li>• What is the long term impact of this project?</li> </ul>
<b>Time bound</b>	<ul style="list-style-type: none"> <li>• When would you like to complete this project by?</li> <li>• Can you break it down into smaller milestones? What are they and when will they be completed?</li> <li>• Are there any other conflicting demands on your time? – if so, how can you manage your time effectively?</li> <li>• When will you spend time on this project?</li> </ul>

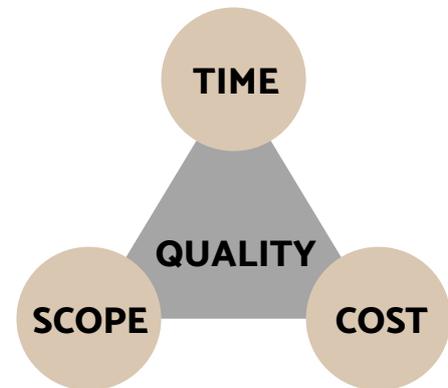
You can use this space to answer some of the SMART questions about your own project plan.

Aspect	Questions
<b>Specific</b>	
<b>Measurable</b>	
<b>Achievable</b>	
<b>Relevant</b>	
<b>Time bound</b>	

## Prioritise the Constraints

**Triple Constraints** – all projects have three main constraints: Time, Cost and Scope. Scope explains the requirements / features of the project. (In some models scope is replaced with the word quality). Added together these three factors affect the quality of the project and they all rely upon one another. Very rarely can a project be cheap, fast and meet all of its scope goals. It is more common to pick two:

Fast and cheap = basic scope  
Fast and wide scope = expensive  
Cheap and wide scope = time consuming



It is essential that you understand the order of priority for these constraints, as it will inform the decisions that you make when planning and implementing the project. You may be able to set the priority yourself or the order of priority may be informed by your stakeholder.

## Agreeing your Project Goals in Writing

All of the previous pages help you to define your project:

- Who are the stakeholders?
- What is the motivation?
- What is the purpose?
- What are the features and benefits of the project?
- What is the project story?
- What are the SMART goals?
- What constraints are you working towards?

Once you have explored the project needs in depth you should be able to create an agreement of the **goals** in writing. This is sometimes referred to as a Project Initiation Document.

For small projects this may be as a little as a short word email:

... you have agreed to cater for 80 people on [date] with these dietary needs, focusing on light foods so people can feel comfortable networking and then dancing. The budget is [£x].

For larger projects this may be a lengthy report detailing the background, previous action, proposed goals and needs of multiple stakeholders.

An agreement in writing at this stage is not final – as you will still need to plan the project and review whether all of these goals can realistically be met. But having a summary at this stage provides clarity and accountability for everyone involved.

## Project Management 2 – Identifying the Tasks

Now that you know what you are aiming for, the team can begin identifying all of the possible tasks needed to complete the project. There are normally three ways of generating this task list:

- 1) Initial brainstorm
- 2) Look at historical projects / research
- 3) Ask an expert to plug any gaps

The 'Affinity diagram' technique can be a good way to brainstorm project tasks (it is also sometimes known as an affinity chart, thematic analysis or the K-J method<sup>9</sup>). It is used to help individuals and teams to generate and sort large numbers of items (20=80). It can be used for:

- Brainstorming / idea generation
- Breaking down complex processes / ideas
- Analysing data
- Creating links between ideas / projects / departments
- Categorising blocks of work / themes to address
- Sharing / collating expertise between team members
- Encouraging new patterns of thinking

### Steps

#### 1) Identify the goal

The team needs to ask 'What is this affinity diagram setting out to achieve?' Usually this means placing a question or statement of the problem clearly for everyone to see. In the case of project management this may be 'restructure the comms department' or 'reduce carbon emissions of the office' or 'run community cohesion training'.

#### 2) Silently record ideas

Team members record as many ideas as possible that either answer the question or relate to the problem. This step is done in silence to encourage creative thinking, ensure that no ideas are judged yet, and to give everyone a fair platform to express. You can do traditional verbal brainstorming but be aware that this changes the dynamic of the task. Things to bear in mind:

- People should write down 'gut reactions' rather than over thinking
- Each idea / item belongs on a separate sticky note
- Each idea / item should be written as briefly as possible (1-7 words is ideal)
- Spread the notes out randomly so that everyone can see them

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<sup>9</sup> Kawakita, J. (1967) Hassouho: Sozosei Kaihatsu notameni [Abduction Method: For Development of Creativity], in *Japanese, Chuokoronsha*

### 3) Identify groups

Look for items which are similar in some way and place them together in groups. This is usually done silently too as discussion of meanings and relationships can slow the process down.

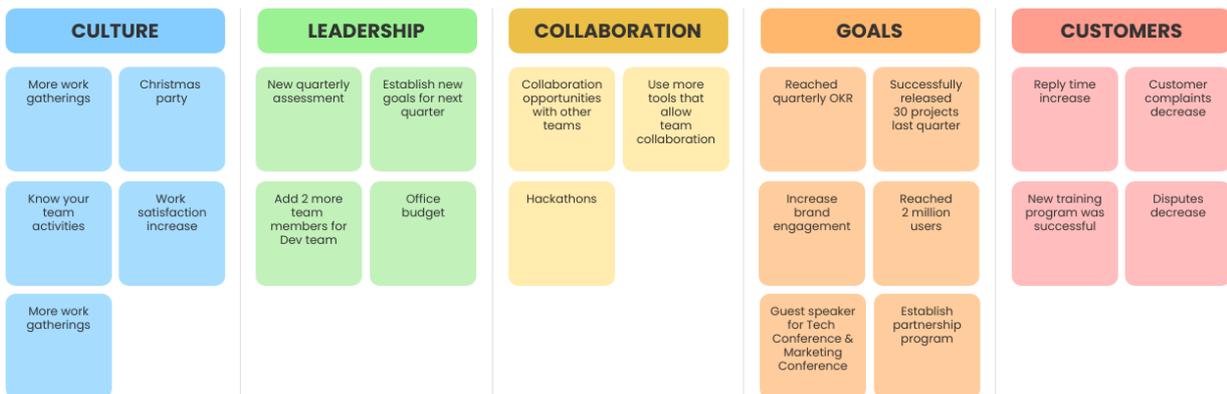
- People can move and rearrange notes that's others have moved. – respectful and silent disagreement is encouraged
- If items fall into multiple groups you may want to repeat them.
- If items don't fit with others, then leave them as loners (don't force them into groups where they don't belong).
- Groups may emerge based on the sections of a project (research, design, implementation), whose responsibility they fall into (finance, delivery) or by any other grouping that makes sense to you and your team.

Sorting tasks into groups may help you to identify other items which can be added to the pile.



### 4) Create headings

Discuss as a team what the items in a group have in common. Use this to give each group a header card. Sometimes you can use an existing note as the header or other times you may need to write a new one. Header cards are usually given a different visual to distinguish them such as a different colour or bold text. At this stage you may also want to rearrange or order the groups (by time / priority) and create super headings to pull multiple groups together.



### 5) Add relationships

If appropriate you may want to add lines, arrows or 'levels' to the diagram in order to create a map which shows order / relationships between the items. Not all affinity diagrams will need this. This can help identify phases of your project or group similar items by responsibility.

## 6) Review & Record

Capture your completed affinity diagram and as you are recording check that it is complete. Begin by recording the goal of the affinity diagram (question or topic) to reinforce the context. Then record the superheaders and headers, adding the items in last. This allows you to check for gaps.

## 7) Next Steps

The affinity diagram stimulates discussion and understanding. Although it may generate ideas it does not yet constitute an action plan. You will need to identify your own team's next steps which could include:

- Assign responsibilities for different groups
- Generation of an action / implementation plan
- Sharing with other experts / stakeholders
- Identifying solutions (if the affinity diagram addresses issues)
- Restructuring a project / organisation

**You will use sticky notes to begin identifying the tasks for your project. When you have finished, remember to record them somewhere safe by writing them up or taking a photograph.**

## Project Management 3 – Estimation of the Tasks

The three constraints were time, cost and scope. The scope is should be clearly defined in the project goals (e.g. vegetarian catering for a birthday party of 40 people') Once your scope is clear, you need to estimate the time and costs needed to meet this.

**Time** – how long will it take a person to complete that task? Decide if it is more appropriate to work in hours, days or weeks. You may also want to consider:

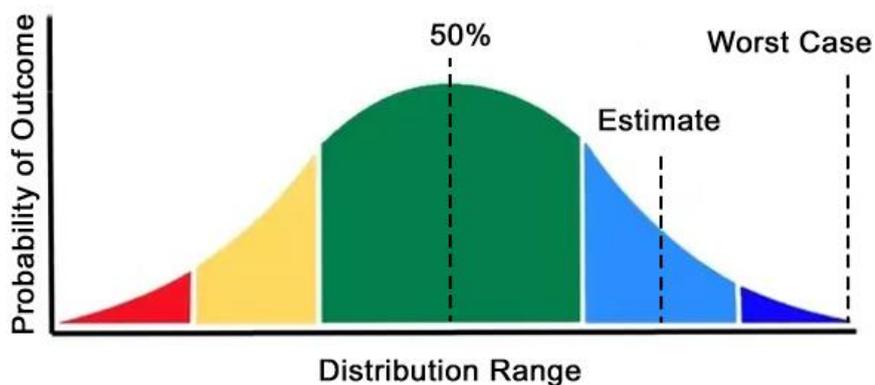
- How long would it take a less / more experienced person to do that task?
- Will one or multiple people be working on it at once?
- Are there specific deadlines or events that affect the time? (e.g. approval times)

**Costs** – this may include the pricing of specific resources, equipment or external services. You may also need to cost human resources such as the number of people & hours working on a task.

### The 50% Rule

You may be tempted to use an 'average' for your estimations. For example, the average staff member could complete this in a day and a half, or the average cost of printer toner is £75.

An issue with using averages is that there is a 50% chance that you will be under cost and a 50% chance that you will be over cost. If you are over cost on a number of items in your project then you will quickly find yourself having to adapt the project parameters or go back to the stakeholders to request a bigger budget – these are not ideal.



Instead, it is better to work at a margin of error around 75%. This means using an estimate which is between the average and the worst case:

Average worker would take 1.5 days, worst case 5 days = estimate of 3 days  
Average toner £75, worst case £120 = estimate of £95

This way of estimating builds in some contingencies for later down the line. You may end up needing to tighten these estimations during stage 5 (crash) but for now they help you protect your project.

**Your project** – you may want to record your estimations of time and cost on the post it notes for each task – or you can use the space here to record items.

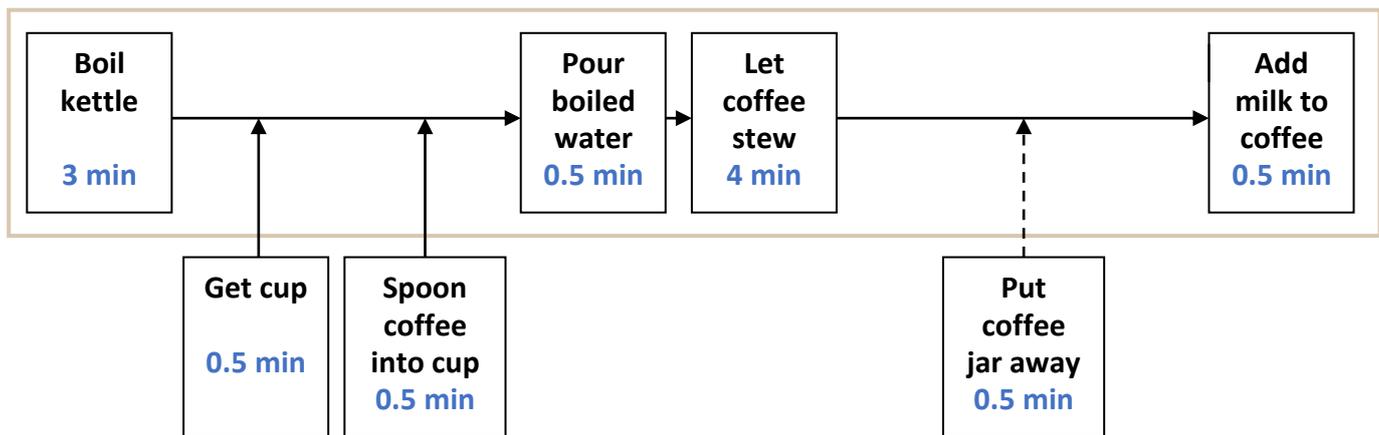
Task	How long might it take someone to do this task?		
	On average	Worst case	Your estimate

Costed item or service	How much might this item or service cost?		
	On average	Worst case	Your estimate

## Project Management 4 – Critical Path

This is an example of a Critical Path for the project of 'making coffee' in the morning.

- If you added up the time of all of the tasks involved it would take you 9.5 minutes.
- However, some tasks include waiting time. On this diagram, this is shown with a main box for the 'active' part of the task and a long arrow for the waiting time (kettle boiling, coffee stewing). You do not need to do anything in this time and so you can do other things.
- 3 of the tasks can be completed whilst other tasks are in progress so the actual time of the project can be shortened to 8 minutes.



**The critical path (or network path)** is the longest chain of tasks that **have** to be done in a set order for a project to work. Delaying any task on the critical path adds more time to the overall project.

**Float or slack** is used to describe tasks which can be completed more flexibly. They still need to be completed before other tasks can take place, but can be 'fit in' around the critical path tasks. A floating task may have a final deadline before it affects the overall flow of the project.

- You must get a cup and put coffee into it before pouring water over it – but you can do these two tasks at any time whilst the kettle is boiling.
- If the kettle finishes boiling and you haven't done these two tasks, then doing them will add more time to your overall project.
- Using solid lines which connect to your critical path gives a good estimate of when the floating tasks could be done.
- Schedule floating tasks before their final deadline (get the cup before pouring the water)

**Optional tasks** are added to the timeline at a convenient place but can be skipped if time runs out as they do not have a direct impact on the project timeline (however, they may change the scope of the project). This has been shown with a dotted line.

- Putting the coffee jar away is shown with a dotted line because it is optional.
- It can be done any time after spooning the coffee into the cup, which makes it flexible.
- If you did not put the coffee away it would not prevent the 'project' of drinking a coffee from taking place. However, it would lead to an untidy work surface that you may need to deal with later – which would change the scope of your breakfast project.

## Waiting times

Many project management tools will use a different symbol or connection to show when a task involves waiting. This helps you to know when you are actively working on part of a project or when you can do other tasks whilst a task is in process. This may be relevant for:

- Sending out surveys and waiting for responses
- Waiting for paint to dry / toast to cool
- Sending an enquiry to a supplier and waiting for them to get back to you
- Waiting for a colleague or other professional to complete their part of the project



## Complex projects

The example on the previous page shows a highly simple task – making coffee. We could make it more complex by adding in other breakfast making tasks:

- Getting toast
- Spreading butter
- Toasting bread
- Wiping the crumbs
- Getting a plate
- Putting toast onto the plate

Each of these tasks would have their own critical path, float times and waiting times. We would need to consider how to fit them in around making coffee in order to create as short a timeline as possible. For example, if we only started toasting the bread once the coffee was finished this would add a lot of time to the overall process of making breakfast. If we could start toasting the bread whilst the kettle is boiling then we could save lots of time.

In more complex projects you will want to think about which tasks can be done in parallel (maybe even by different team members) to keep the overall project time as short as possible.

### Tips for your project

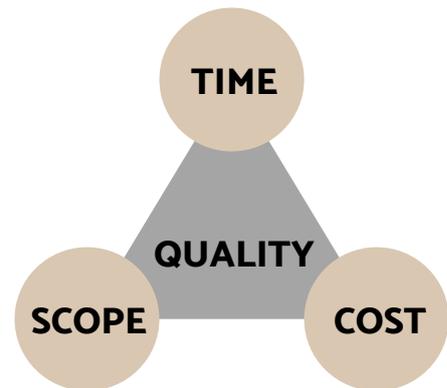
- Use your 'task' sticky notes with all of your time estimations to create a critical path
- You could stick the notes on a whiteboard or piece of paper so that you can draw arrows between tasks (or corkboard with pin & string arrows)
- Use empty space and arrow length to help you represent time / length of tasks
- Try to 'stack up' tasks that can be done simultaneously – either because they involve waiting or because they are carried out by different people and so do not compete for resources
- Complete floating tasks as early on as possible to allow for buffer time later
- Think about your estimates and the consequences of errors – if you finish too soon will you have to wait anyway? If you finish a task late, will it delay the whole project?
- Remember this model still doesn't say WHO does it each task – will people's availability, expertise or other factors affect the timing of tasks?

# Project Management 5 – Schedule Compression

Once you plan the critical path you may realise a need to save time on the project – if it would over run the deadline or time was the most important factor to your stakeholders.

Usually changing the timing of a project will have an impact on the other two constraints.

The PMBOK guide<sup>10</sup> identifies two key ways of shortening project length:



**1. Crashing** – adding extra resources to a task so that it can be done quicker: worker overtime, fast track delivery, extra staff, time-saving equipment. These often increase the project costs.

**2. Fast tracking** – tasks that are normally done in sequence are instead done in parallel or partially overlapped. This may mean creating the template for your newsletter before the design work has finished, building the beams of a structure before the insides are designed. This may not increase costs if different people were carrying out those jobs anyway. However, this approach can add extra risk to a project if completion of the first task reveals that part of the second task needs to be undone (the newsletter template doesn't match the logo sizes or the designs for the structure got changed).

There may also be the possibility of **reducing scope**. This occurs a lot in the software industry, where programmes are launched / released without all of their features, with the hopes that further software updates can be released later.

**If you had to save time on your project, would you rather:**

- Crash and therefor increase the costs?
- Fast track tasks and risk having to re-do some of them?
- Reduce the overall scope of the project?

<sup>10</sup> Project Management Institute. (2013) A guide to the Project Management Body Of Knowledge, – Fifth Edition

**Compression checklist** – other questions to help you shorten your timeline.

- **Is there value in shortening the project?** – if you are over deadline or want to build in more buffers then this may be valuable. If your project plan will probably meet the deadlines, then compression may not be needed at all.
- **What are your longest, critical tasks?** – you will only really gain time if you make changes to tasks that are long. Short tasks are hard to shorten even more. Also, if tasks are not on the critical path then shortening them may not affect the overall project timeline.
- **What resources are available?** Money, skills within the team and wider staff, freelancers, equipment that could save time.
- **What is the ramp up time?** When working with people you have to consider how long it will take to get them up ready to work effectively on the project, their role and any context.
  - If tasks are easy then adding new staff members who can quickly start will save time.
  - If tasks are complex then it will take time to train / prepare people to help you. This will only be valuable if tasks are long.
  - Some physical equipment can speed up a task (spray gun painting rather than a paintbrush) but this may take a long time to set up. It may also add costs which are only valuable for larger or repeated projects (rather than single use).
- **How would extra people impact the team?** As well as the extra hours you may have to consider the culture, dynamics and power plays that could occur and whether they would ultimately slow down the project.



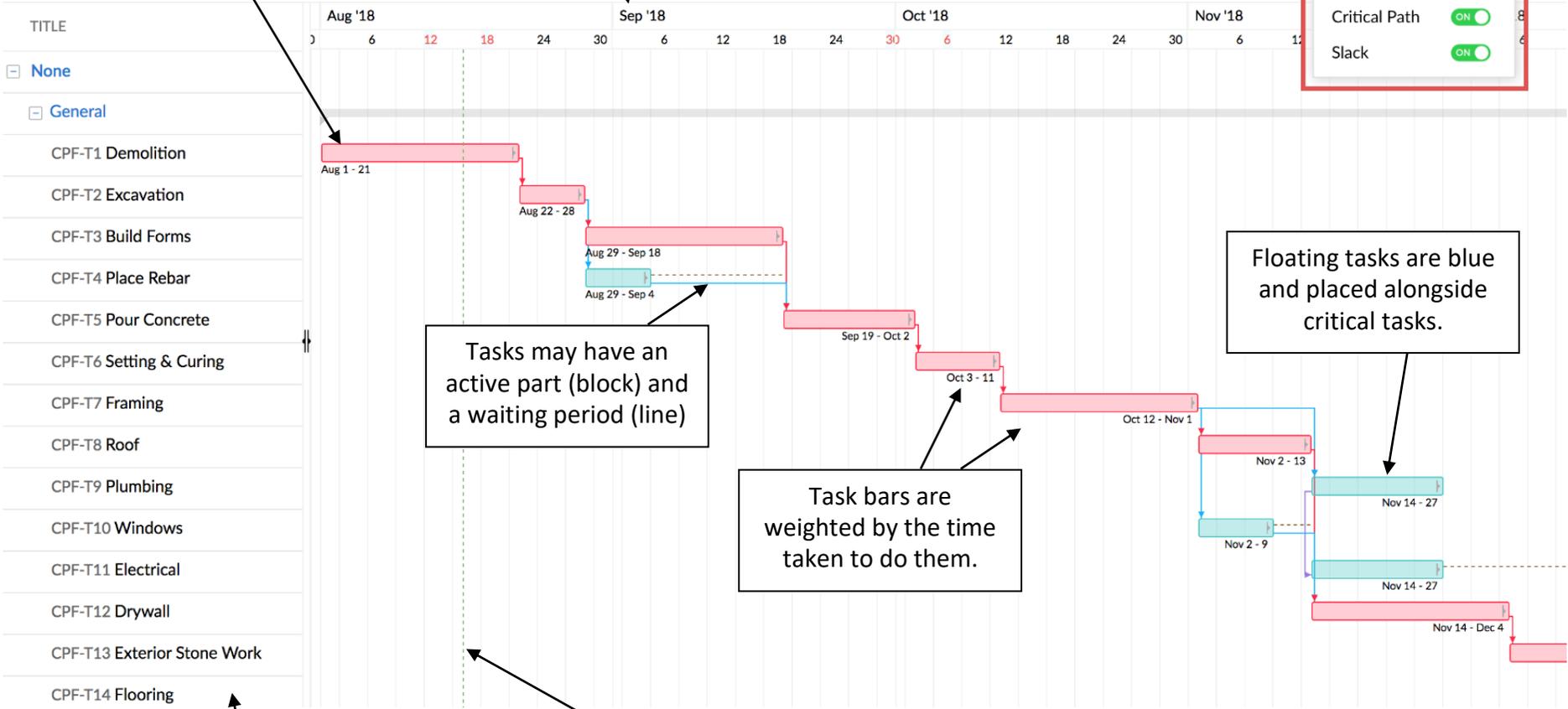
The example below shows a critical path Gantt Chart.

Critical path tasks are red and connected by arrows.

Horizontal axis displays the timeline for the project.

Critical Path

Slack



Tasks may have an active part (block) and a waiting period (line)

Task bars are weighted by the time taken to do them.

Floating tasks are blue and placed alongside critical tasks.

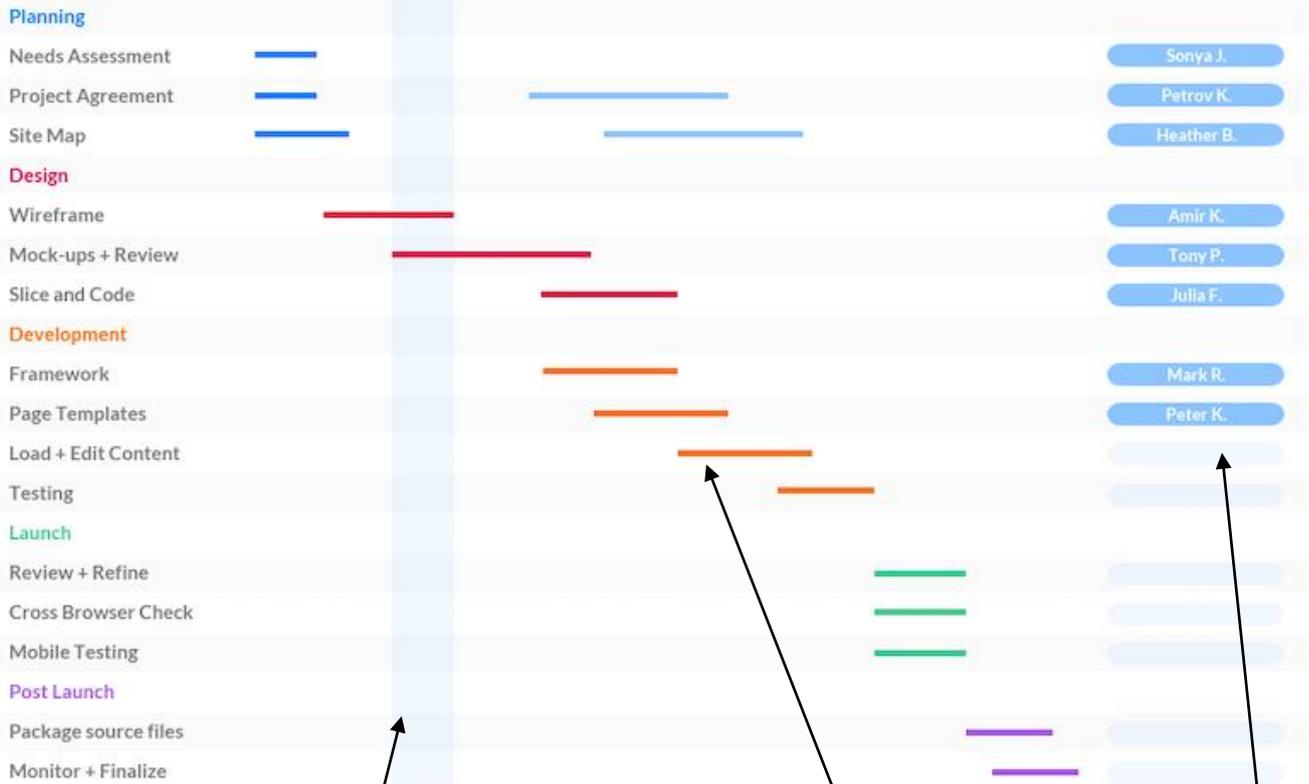
Vertical axis shows tasks broken down and put into time order. They may be coded to match other reports of the project.

Current progress is shown by a marker on the timeline.

These Gantt Charts do not have a critical path.

Timeline

W1 W2 W3 W4 W5 W6 W7 W8 W9 W10 W11 W12



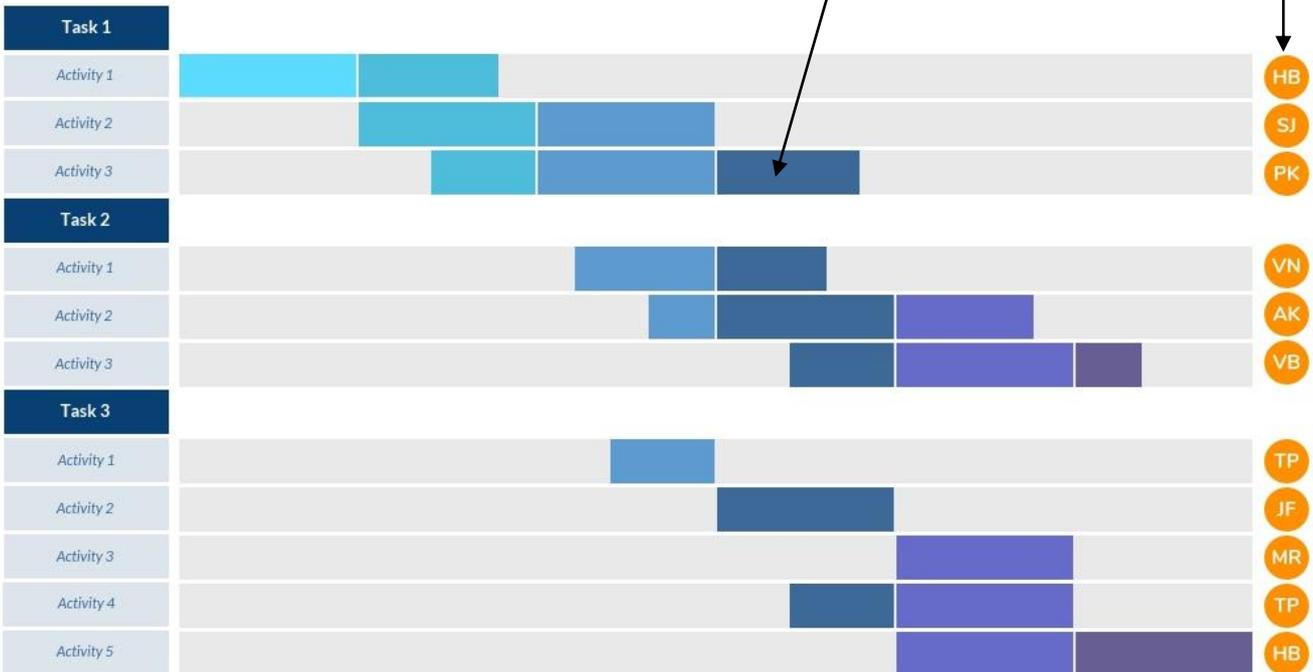
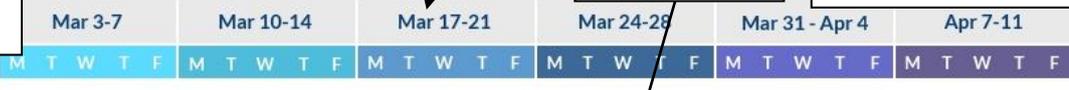
Tasks listed in time order and grouped into phases / categories

Progress bar

Timeline

Task length shown by bar size

Person responsible for completing tasks (sometimes colour coded)



## Creating a Gantt Chart

### 1. Choose a tool or platform for your Gantt chart. You may wish to explore:

- A paper chart version that can be hung in the office.
- Using standard computer tools such as excel.
- Investing in a project management app or software system.

### 2. Plot out the time axis (on the horizontal axis).

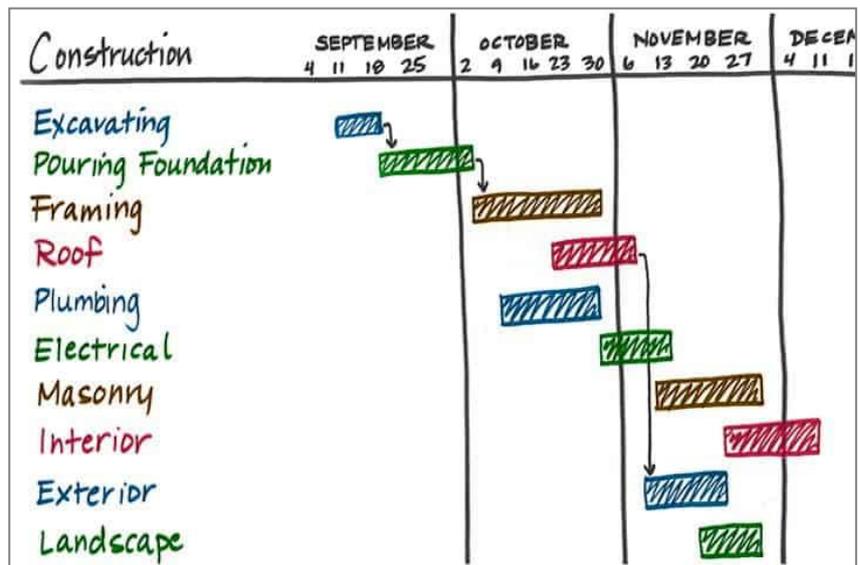
- Use your critical path post it diagram to decide on your timeline – hours, days, weeks, months.
- Chart from now until the end of the project.
- Review any points of zero activity and block them out – weekends, holidays, the team attending conferences. You may need to extend the timeline to make up for these gaps.

### 3. List the tasks (vertical axis)

- Decide if all of your tasks will be loose or whether you will categorise them (by theme or phase)
- List the tasks down the column in time order

### 4. Block the tasks.

For each task use a line, block or coloured in box to show the length of the tasks. You may want to make this editable later (faint pencil, draft document)



### 5. Mark key information.

- You may wish to use a connecting line to mark off the critical path
- You may wish to use markers or vertical lines to show milestones and deadlines that will impact the project
- You can use lightly shaded blocks or lines to show 'buffer time' on 'floating tasks'

### 6. Assign the tasks.

- At the right hand side you could use name labels to allocate responsibility for tasks.
- Many software tools allow you to allocate so that people can track their own task bank within their software portal
- Consider colour coding tasks by who is responsible for them so that people can easily see 'All red tasks belong to...'

7. **Review** - Once the draft is complete check:

- a. Is anyone working on multiple tasks at once – if so these may need moving around or reallocating
- b. Are people only available at certain times / periods / days of the week?
- c. Are there particularly busy periods for the project? If so, do you want to move floating tasks or hire extra staff here?
- d. Are there risk areas? This may be a number of tasks all coming together in a bottleneck before a deadline. If so, you may wish to build in more buffer time.

8. **Publish and share.**

**Look at the sticky notes you created for your project.  
Can you organise them into a Gantt Chart?**

# Project Management 7 – Resource Planning

In your estimation stage you should have begun outlining things you need for the project. These could be sorted into:

- Internal vs external resources
- Human resources vs physical resources
- Ongoing costs vs one off costs
- Ownership vs rental
- Consumable resources vs multiple use

Examples may include:

- Stationary
- Furniture
- Software
- Venue hire / office rental
- Equipment
- Staff costs
- Management tools
- Consumable resources (leaflets, bricks)
- Catering
- Printing
- Postage
- Design
- Auditing
- Subscriptions (licenses, publications)
- Service rental (phone, software)
- Advertising (physical, social media)
- Legal checks (DBS, PAT testing)
- Professional fees (photography, accountancy)
- Currency exchange
- Travel
- Qualifications

## Recording your resources

The main purposes of keeping track of your resources are:

- a) To recognise when you will need them
- b) To estimate the total costs of the project

The way you record your resources may depend on the scale, length and complexity of your project. For smaller projects you may be able to simply add annotations to your Gantt Chart or affinity diagram (sticky notes) so that you can see on the timeline when things will be required.

For more complex projects you may wish to make a separate tracking system such as a table, chart or report. Decide whether to present the resources for the whole project, or whether to break them down into time units (week one, month one) or project phases (development stage, delivery stage).





## Costing the Project

For each cost, decide on the unit of measurement. For example:

Staff time – hours or days?

Printer ink – number of cartridges or millilitres?

Bricks – weight or per brick?

Professional fee - per hour or job?

Decide on the level of accuracy you wish to apply to each cost – some costs may be rounded up or estimated (£200-£250 for logos) where others could be priced exactly (£1.42 per notepad). Most projects will have built in contingency figures for costs in order to manage any risks or delays further down the line. (Remember the 50% rule is risky, so 75% may be better)

**Project contingency** - if the project is estimated at £5000 then you may add a contingency or buffer of 10% (or another amount) to the whole project, creating a total of £5500. For this to work, you need to give a realistic or average price for each item and then choose a reasonable % buffer.

**Item contingency** – as you cost up each item, decide on a value that adds in contingency. One way to do this is look at the realistic price, pessimistic price and optimistic price – using the pessimistic price to help inform your contingency amount. This allows you to track high risk items in your budget more easily.

Project	Living Room Renovation			
Staff Costs	Unit Cost	Units	Total	Item Contingency
Plasterer	£200 day	1	£200	£400
Electrician	£250 day	2	£500	£750
Decorator	£200 day	4	£800	£1000
Physical Costs	Unit Cost	Units	Total	Item Contingency
Skip Rental	£200 per week	2	£400	£600
Light fittings	£45 each	2	£90	£100
Switches	£2 each	1	£2	£3
Plaster	£3 for 500g	1kg	£6	£8
Paint	£16 for 2.5l	5l	£32	£40
Wallpaper	£18 per roll	6	£108	£130
		<b>Total:</b>	<b>£2138</b>	<b>£3031</b>
	Project Contingency	20%	<b>£2565</b>	

In the costing table above, you can see that the item contingency is much higher than the project contingency – this is because the most expensive parts of the projects are staff costs. If an extra day or half day per person is added to the project then this significantly increases the project price. This project manager may estimate that the chances of needed the plasterer for an extra day are much more likely than the costs of the physical items being significantly different to the budget.

Each project may need a different type of contingency based on where you feel the biggest risks to budget are. You could also choose to go for a project contingency with a higher percentage leeway (30-55%) depending on the risks.

When costing a professional project, remember you may need to add in your own wages / fees / expenses as the project manager - as these can sometimes be overlooked.

**Cost Timeline** - Larger projects may need costs breaking down into weeks / calendar months in order to help with the monitoring process later on.

**Your Project** – you can use this space to start estimating some of your costs

<b>Project</b>				
<b>Staff Costs</b>	<b>Unit Cost</b>	<b>Units</b>	<b>Total</b>	<b>Item Contingency</b>
<b>Physical Costs</b>	<b>Unit Cost</b>	<b>Units</b>	<b>Total</b>	<b>Item Contingency</b>
		<b>Total:</b>		
	<b>Project Contingency</b>			

## Project Management 8 – Risk Analysis

Many projects do not run exactly to plan because there are so many variables to keep track of. Anticipating these risks is the first step to managing them quickly and reducing the impact that they have on your project. You have already done some level of risk analysis by adding contingency values to the budget and the timeline.

Smaller projects may have a fewer number risks to consider – but they can still have a large impact on the project if they affect the scope, cost or timing of the project.

Brainstorming all of the things that could go wrong allows you to create a ‘risk log’. Once you have identified each item, complete the following questions

- What is the risk?
- How likely is it to happen?
- What will the impact be on the project?
- What is the significance (likelihood x impact)
- Who is responsible for monitoring and managing this risk? (the owner)
- Are there any actions to take? When?
- What is the current status of the risk?

These questions allow you to prepare in advance of the project. The status column would be filled out during the project as part of the monitoring process.

Risk	Likelihood	Impact	Significance	Owner	Actions	Status
Contractors cannot come on the planned date	3	5	15	Me	Call staff a week before arrival date to confirm. Allow buffer time between staff bookings	26.6.2021 – Called contractors to confirm date. Electrician will be late one morning – I can clean whilst waiting.
Removing wallpaper reveals mould	1	5	5	Decorator	Check as soon as wallpaper removed. Add extra days work for decorator. Add extra costs for treatment.	30.6.2021 - Removing wallpaper revealed mould in one corner. Bought mould remover, added half a days work.
Decorating materials cannot be found at the costs stated.	2	2	4	Me	Price checked during budget phase. If prices change, decide whether to pay higher rate or find different item elsewhere.	2.7.2021 - Bought all materials. Paint higher price but saved money on wallpaper.
Misjudged amount of wallpaper needed.	5	2	10	Decorator	Over buy wallpaper to ensure we do not run out. Return unopened rolls after the job.	5.7.2021 – Returned one roll of wallpaper

The risk items with the highest significance need monitoring the most closely.



# Project Management – Reconfirming The Project

Everything you have done so far on your project is still part of the planning stage! You used the stakeholder goals to develop a full project plan including the time frame, task order, resources, costs and risks.

Going through this process may make you realise that aspects of the plan have changed from the original goal...

- You can meet all of the objectives but it will take a month longer than planned
- In order to deliver for an event, you need extra staff which will increase costs
- The plan is fine, but there are high risks that could change the cost and deadline which the stakeholders may or may not be willing to work with

If you are the main stakeholder then you can decide whether to proceed with the project – now that you know exactly what will be involved.



If you are working with an external stakeholder then you need to have a meeting to ‘reconfirm’ the project.

- Recap the originally agreed project goal
- Present your detailed project plan
- Highlight any areas of the project plan that may differ from stakeholder expectations (cheaper / more expensive, takes longer)
- Ask questions to clarify any adjustments or needs (e.g., can you give us an extra week? Can we cut one of the requirements?)

Larger projects may need a formal written proposal – or even multiple proposals such as the low-cost option, the fast option and the narrower scope options for stakeholders to consider.

As this can be a sensitive part of the project other soft skills come heavily into this section:

- Active listening – to their needs, concerns and goals
- Flexibility and Negotiation – as one parameter changes others will need to be adjusted
- Assertiveness – being confident but polite in telling stakeholders what you realistically can and can’t deliver
- Sensitive communication – being mindful that people may have emotional investments in their projects and that you should be both empathetic and objective
- Conflict resolution – if you are working with multiple stakeholders then you may have to manage different priorities in the project as well as their resource commitments and interaction styles.

When you have adapted the project plan as needed you should confirm all of the final plans in writing so that yourself and the stakeholders have a clear picture going forwards.

It may be possible that after planning all aspects of the project you and the stakeholders realise that the project is not feasible and so you cancel the project. If this is the case you may need to agree on a financial commitment for the time you spent planning. (though this may have already been agreed in advance).

### **Milestones & check ins**

If the project does go ahead, part of your agreement should include key times to be in touch with stakeholders. This may be at regular time intervals (quarterly) after project phases (construction complete) or after significant milestones in the project.

**NOW YOU ARE ABLE TO LAUNCH THE PROJECT!**

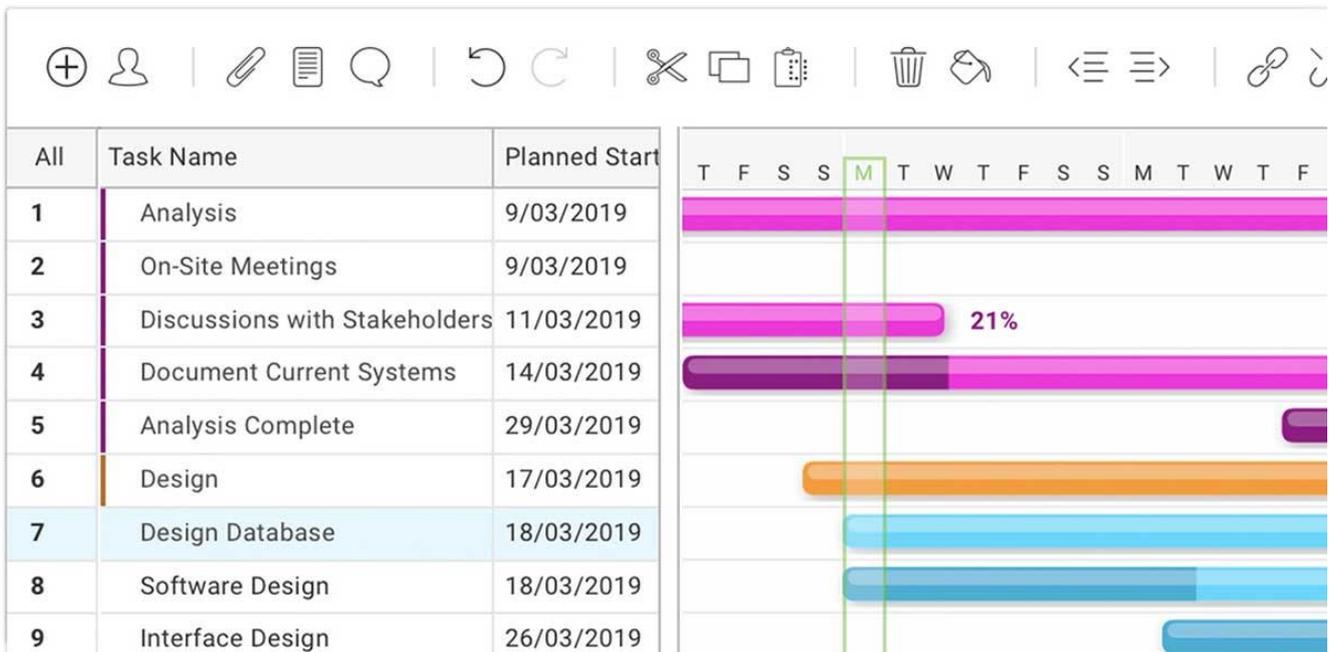
# Project Management 9 – Monitoring Progress

The project manager needs to continually monitoring the project to make sure that everything is going to plan. Sometimes this is the only job of the project manager, sometimes the project manager is also working in the project. You need to decide how often to:

- Meet with individual team members / departments
- Compare task progress to the Gantt Chart / other workflow records
- Review the budget to date and projections going forward
- Review the risk analysis
- Update the stakeholders on progress / changes

## General Progress

In the project planning stages you should have planned the project in lots of detail – tasks and timelines. This means that you should be able to look at any given week of the project plan / Gantt Chart and see what people are working on. Individuals may colour in / block out / tick off their task as they make progress on it or complete as shown below.



Some of the project management tools and apps allow you to add completion percentages to tasks or colour coding to signal; not started, in progress, stuck, completed and other custom options.

## Keeping track of the project

One of the disadvantages of the project manager is that they usually know a little bit about every part of the project, rather than knowing the whole project well. In smaller teams, the project manager will undertake a part of the work – but in larger teams their role is leading and managing others which distances them from the day to day action.

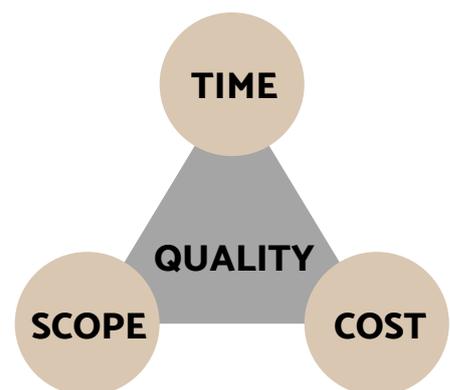
This is why positive relationships within the team are essential for project success. Good leaders build teams with high levels of trust, accountability and rapport. This will create a safe space so that team members feel able to honestly share their successes and concerns / challenges over the course of the project. The earlier people are able to inform the project manager of a deviation from the plan (whether positive or negative) then the easier it will be for the project manager to minimise the risks involved.

### Making Adjustments

Once the project starts, the main role of the project manager is adjusting the plan in real time and being the point of contact for team members / parts of the task to ensure that everyone knows how delays (or early completions) affect them.

**For example:** Your team member has completed the copy text for a campaign leaflet and has sent it to the graphics department. They have a number of tasks and have told you there will be a two-day delay on mock up and printing. This means that you only have one day for editing and confirmation instead of three.

As a project manager you need to weigh up the possible actions with the impact they would have on the triple constraint. You should have a good understanding of which of the constraints are the most important when delivering the project which will help you to make a suitable decision.



Possible Actions	Possible effect on Triple Constraint
Pressure / persuade the graphic team to complete on time	Reduce scope because they rush it Increase cost to do it quickly
Delay the whole project to allow the full three days for editing and review	Increase time taken for the project
Strive to review in a shorter period	Reduce scope and possible quality if mistakes are not edited
Publish without review	Reduce scope and possible quality if mistakes are not edited
Pay to use a different design service with a faster turnaround	Increase costs

For more serious set-backs, you may need to speak to the stakeholders to get them to sign off on certain decisions. This is covered in section 11: Rescheduling.

## Project Management Processes

There are a number of different 'methodologies' that can be followed at the actual implementation stage of the project and you may hear discussions about whether agile, scrum, kanban or waterfall is a better way of managing a project. Each style may be suited to different types of projects, team dynamics and time frames.

It is worth understanding that many of these styles are influenced by historical patterns of workforce behaviour. Project management as we know it was developed in the industrial era when the likes of Gantt were using planning charts and Henry Ford was packaging work into chunks to create the assembly line for mechanical products. This mindset of creating a 'recipe' for the workflow and reducing the time between each task could be managed to increase the efficiency of the individual as well as the overall task.

This is characterised by the 'waterfall' way of working.



**Waterfall** – where the series of tasks are carried out in sequence. One stage cannot be started until the previous is completed. (Not without serious risks) This is a linear flow that is tracked on a Gantt Chart. This leaves some team members waiting around and can be time consuming for some types of projects which could benefit from parallel task completion.

**Overlapping** – although the tasks are generally sequential, it is possible to start one task as another is finishing to save time. For example, you need the plans for a house before building it – but you could build the foundation and load bearing walls before finalising the designs for the upstairs.

**Agile** – a term for a range of principles and values used by teams carrying out projects. It is a system that was developed in the software development industry but has spanned into other types of projects. The Agile Manifesto<sup>12</sup> states: "We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan

<sup>12</sup> Agile Manifesto <http://agilemanifesto.org/iso/en/principles.html> Accessed 12/6/25

There are also twelve principles to guide decision making:

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
4. Business people and developers must work together daily throughout the project.
5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.
6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity--the art of maximizing the amount of work not done--is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behaviour accordingly.

This means that agile ways of working may put less priority on the Gantt charts, recording the process of teams and using management apps in favour of actually working on the tasks and re-engaging with stakeholders and each other along the way.

### **An Agile Example**

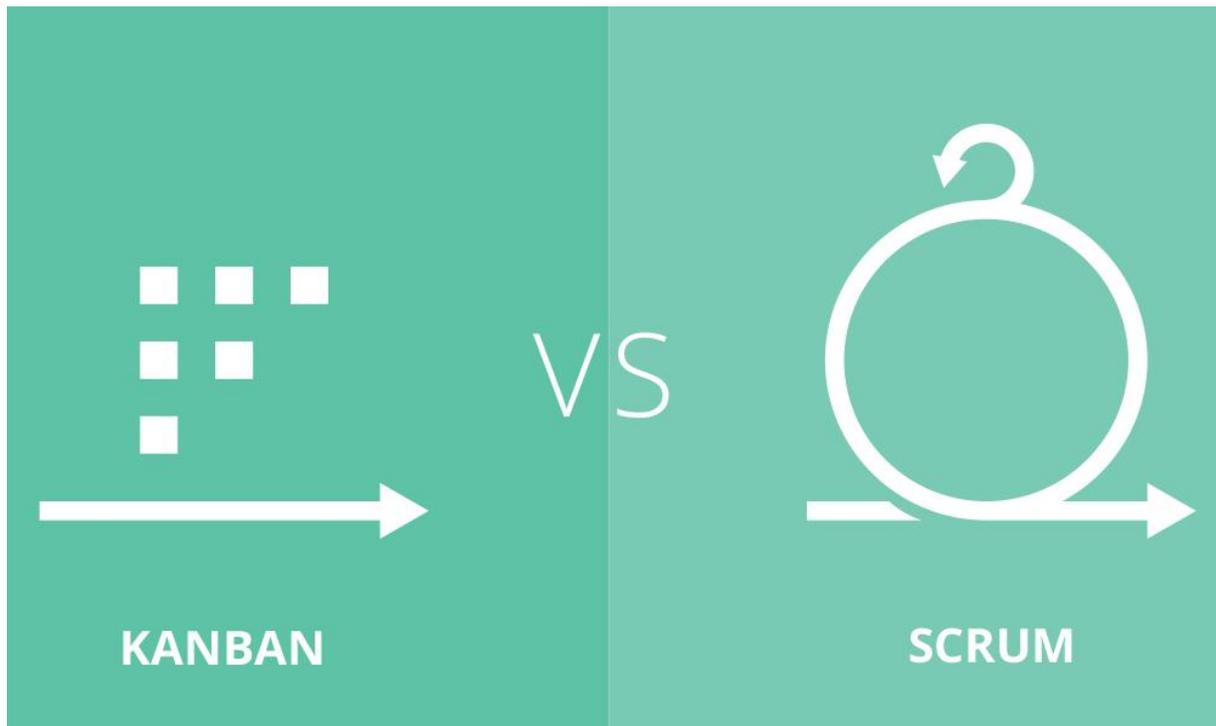
The agile framework is heavily tied to the software industry but can apply to other types of project. For example, if a stakeholder is looking to reduce their energy costs across their sites this could be done in an agile way, rather than waterfall. It is possible that rather than linearly researching, writing a plan, signing it off, delivering the work and focussing on paper trails so that things could be done more fluidly.

The project manager could work with the stakeholder to tour around the building discussing a room or area's needs, developing changes for that area, presenting back and then moving on to other areas. This could allow the delivery of small chunks of change over an extended time rather than making the majority of changes during a single 'implementation' phase like in waterfall.

**Agile** is often broken down into two styles: **Scrum** and **Kanban**. They both promote efficiency and collaborative working when a team is working on lots of floating tasks (such as in software development).

### **Waterfall, Overlapping or Agile?**

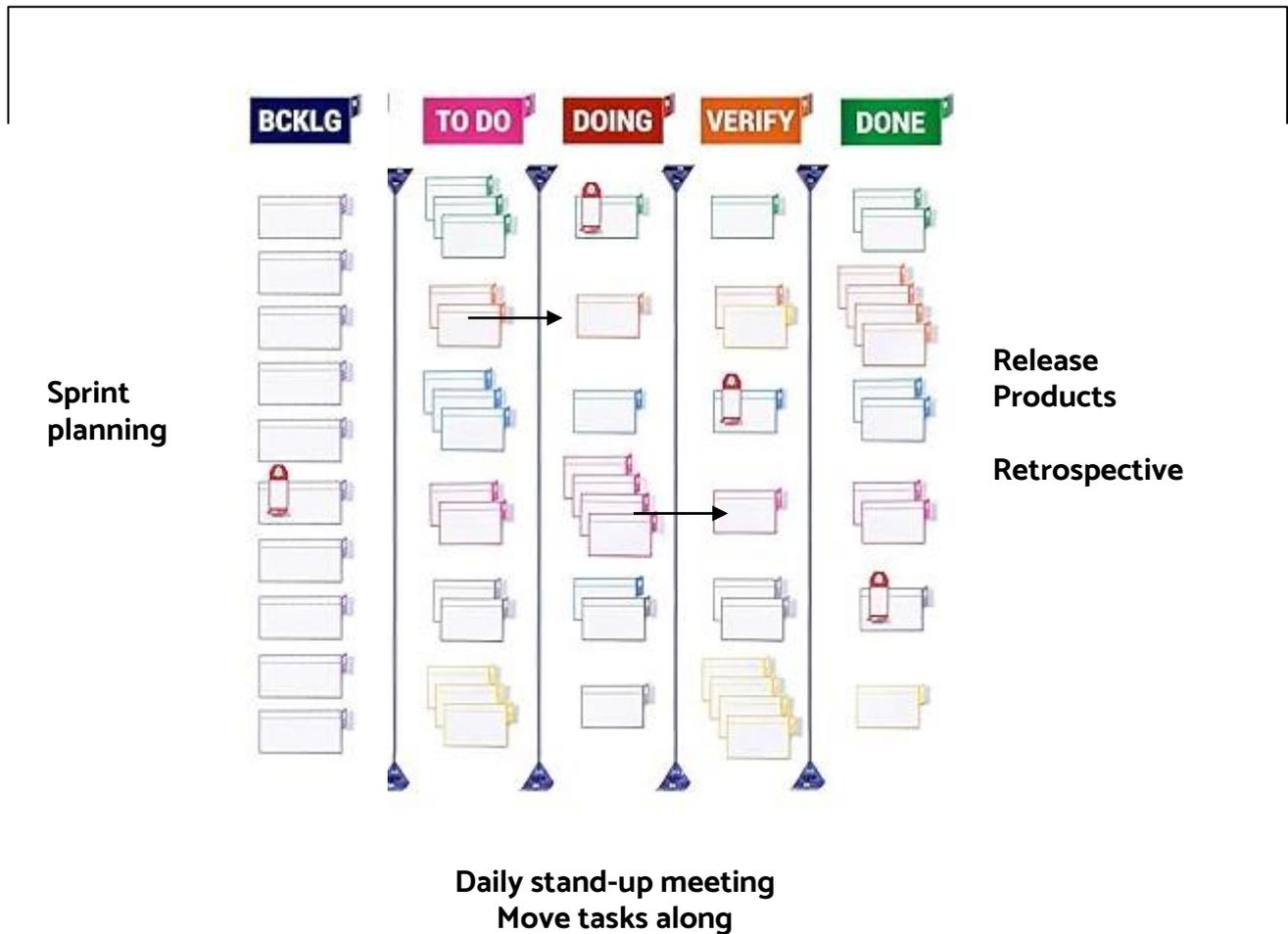
In delivering your project you need to decide if the whole task is linear (building a house), has overlapping parts (designing campaigns) or can be continuous (releasing blog articles). Perhaps within a linear project there will be piles of floating tasks that can be approached in an agile way. These management styles act as tools in your box to try and improve project efficiency.



#### **Scrum**

- Work is organised into two week intervals called sprints.
- There is a pile of goals to be achieved called the backlog.
- At the start of each sprint people plan and estimate what they think they can achieve and possible challenges. This is used to decide what goes into the 'to do' pile for this sprint period.
- Individuals have daily 'stand-ups' where they share priorities and allocate tasks.
- Each task moves along the scrum board.
- The tasks that are completed are passed back to the stakeholder at the end of the two week period (e.g. completed apps, finalised products).
- At the end of the sprint the team reviews the work using a 'retrospective' meeting to learn from the week, see what was completed and put any incomplete tasks into the to do pile for the next sprint period.

## Two Week Sprint

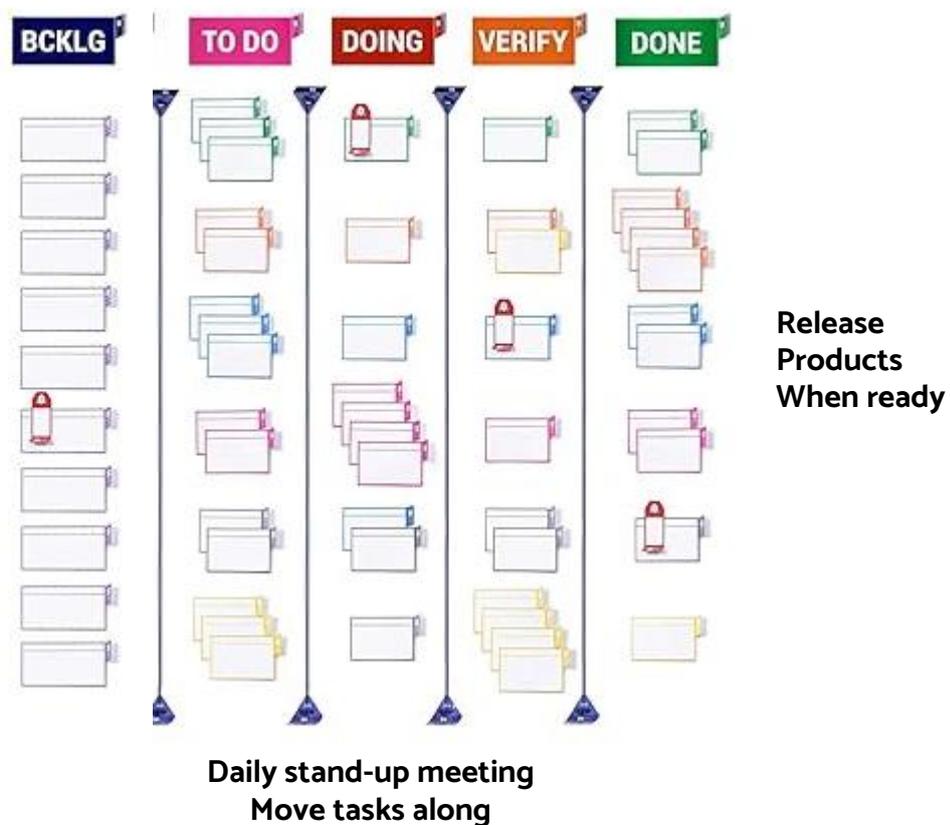


Scrum is a useful approach for newer teams who may not be as confident at self-managing. The two week bursts allow for the group to have a particular focus and an end goal to work to. The daily stand up meetings mean everyone can hold each other accountable and motivate each other on the tasks. Regular but brief planning and review sessions encourage the team to hone their work skills and become more and more confident in their role over multiple cycles.

Critics of scrum may say that too much time is spent 'talking about work' instead of doing work. Mature teams may find the pattern of planning tiresome and repetitive, and so favour a Kanban approach instead.

## Kanban

- There is a pile of goals to be achieved called the backlog.
- Individuals have daily 'stand-ups' where they share priorities and allocate tasks.
- Each task moves along the Kanban board.
- The tasks that are completed are passed to the done pile. The team decides how frequently to release these to the stakeholders – which can be once or twice a week or whenever a significant product is ready.
- There is no planning or review meeting.
- There are no time 'deadlines' – all work is continuous.



A problem with Kanban can be that without planning or deadlines, people have everything in the 'doing' pile at once. Kanban teams work best when they limit the number of tasks being worked on so that team members can focus their attention fully on those tasks.

Because there are no planning or retrospective sessions it is important that Kanban team members reach out to others when there are blockages in the workflow to help things along further.

Kanban works well in experienced teams because people have a great deal of autonomy and are always focussing on moving part of the team forward. By completing chunks of work continuously and releasing regularly, they have a stronger communication relationship with stakeholders.

## Prioritisation Skills

In his book, *The Seven Habits of Highly Effective People*<sup>13</sup>, Stephen Covey presents the habit 'Put First Things First'. The idea being that effective people (and project managers) are able to identify what is a priority and allocate time to work on that activity. He encourages people to use a sorting matrix to identify the importance and urgency of tasks:

- **Importance** – How much do you want to do this thing or how necessary is it that you complete it? Is it part of the critical path?
- **Urgency** – How soon is the deadline for completing this activity? Do other tasks rely on this being completed?

As a project manager you could start your week or daily stand up by reflecting on the tasks in the project and sorting them into the following grid:

	HIGH IMPORTANCE	LOW IMPORTANCE
HIGH URGENCY		
LOW URGENCY		

<sup>13</sup> Covey, S. R. (1989). *The Seven Habits of Highly Effective People*. New York: Simon and Schuster.

Steven Covey suggests that the most effective people in life spend more time in the High Importance / Low Urgency box – completing tasks before they become urgent and making time for the items with no deadline. The model below shows how effective people treat each of these time boxes.

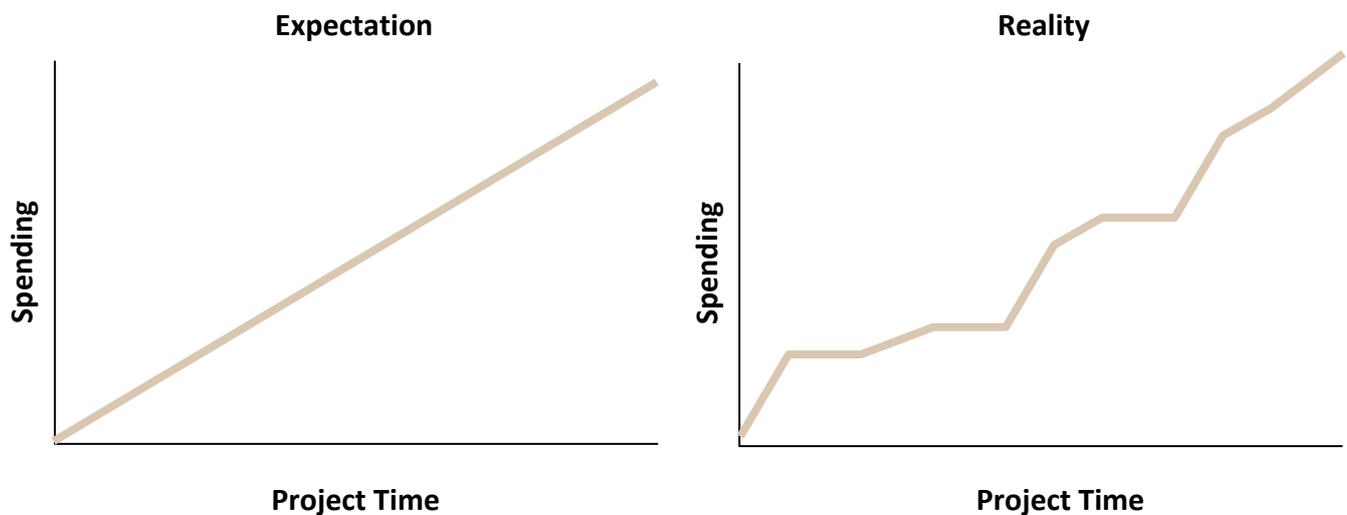
	HIGH IMPORTANCE	LOW IMPORTANCE
HIGH URGENCY	<p><b>Meet deadlines early</b></p> <p>The most effective people make sure this box is empty or only has a couple of things in it. That’s because they completed the task before it became urgent – at the start of the time frame.</p> <p>Ineffective people let these items stack up, procrastinate and end up continuously chasing deadlines.</p> <p>Obviously if you have items in this box then you need to prioritise them. Complete them quickly so that you can get back to your first things first box.</p>	<p><b>Be efficient and assertive</b></p> <p>Often, the things in this box are daily routines or menial tasks (walk the dog, reply to emails) or tasks that other people have suddenly allocated to you.</p> <p>To clear this box you need to be efficient – what is the quickest (but still effective) way of getting it done? Can you delegate? Can you develop a system so there is less of this to do?</p> <p>If you find yourself doing lots of urgent tasks for others then you may need to assertively turn down those tasks.</p>
LOW URGENCY	<p><b>Put first things first</b></p> <p>This box tends to contain a mixture of tasks where the deadline is far away and activities that have no deadline (learn the guitar).</p> <p>Because ineffective people are usually chasing deadlines, they rarely make time for the activities with no deadline.</p> <p>Effective people plan to spend time on tasks before the deadline, allowing them more flexibility to fit in personally important tasks without guilt. This often means that they have a better work life balance and feel more fulfilled.</p>	<p><b>Cut out wastage</b></p> <p>This box tends to be filled with things that simply pass the time: playing on apps, checking social media, watching tv etc. If there is a show or game you love then put it in the important box and make time for it. But if it’s something that doesn’t bring you joy or feel important to you then why bother? – there are better ways to relax.</p> <p>Try and cut down on these things, or cut them out altogether. That way you have more time available for activities that are purposeful and fulfilling.</p>

This model is more tailored to individuals’ personal time management. As a project manager you can encourage your team to consider the tasks and activities in their working week in order to highlight their priorities. This may complement an agile system – showing team members which tasks in the backlog deserve their attention first.

# Project Management 10 – Monitoring the Finances

Each individual or team should have a system for recording their spending over the course of the project so that this can be continually reviewed and managed. Your workflow diagram or budget would be good places to have this information.

The main thing to consider when viewing the budget is that spending may not have a direct relationship with the project time – unless the only cost is your staff who work consistent hours over the project.



Usually costs have spikes and plateaus. For example, if you were planning a wedding with a total budget of £15,000 over a year, that does not mean you would spend £1500 a month. Venue deposits are paid up front to secure availability whereas the photographer may be paid in the final month of the event. The lesson here is to track the budget according to your expected payment times and look for any discrepancies along the way. (Do you have the funds available for each phase of your project?)

It is helpful to check your spending against the budget after each 'phase' of the project is completed to see if you are on target, over or under. If you are over you have to consider whether costs can realistically be reclaimed from a later part of the project, something can be cut back or extra budget needs to be asked for.

# Project Management 11 – Rescheduling

All project managers hope to avoid the rescheduling phase. This is where an issue in the project requires you to go back to the stakeholder and renegotiate the project. This can also be known as making a ‘change request’.

Change requests happen because the project manager realises that the level of error between the plan and reality is too big. It is usually directly related to the three constraints:

- You are unable to deliver in the time frame
- The project is costing more than anticipated
- You are unable to deliver the full scope of the project

This stage can very easily damage trust between the stakeholder, the project manager and delivery team if it is handled badly. People can be very distressed that things have not gone to plan and they may question why. This is a good reason why project managers should also work on developing their soft skills alongside their management processes to help them communicate sensitively and negotiate appropriately.

Tips for rescheduling with a stakeholder:

- **Be concise** – tell them what they need to know about the project, but don’t get caught up in the whole story. Over sharing can look like making excuses or dragging things out. Keep it short and they will ask for more information if they need it.
- **Decide on the HOW to communicate** – consider whether it would be better to speak face to face, over the phone or via email. If legal contracts were drawn up, decide if you need a professional present. Do you need other members of the team with you such as the person who knows a lot about the issue (the accountant, engineer etc)?
- **Ask at the right time** – the later the change request is made, the more likely the stakeholders will have a negative response (thinking that you were hiding something). It is important to allow enough time to pass that you are certain a change is needed, but soon enough that any changes implemented successfully get the project back on track.
- **Present your best solution(s)** – Just explaining the problem (we ran out of money / it will be late / we can’t build X) is more likely to damage your reputation and that of the project. It is important that you also outline your suggestions for still achieving the project goals.

## **For example:**

At the moment the project is running over budget by XXX amount because of XXX reason. We could either remove XXX features to save costs or continue with those features and spend XXX more. What would you prefer?

It is important to give stakeholders the needed autonomy in how their project continues once the problems have been identified.

# Project Management 12 – Review the Project

The exact review steps involved at this stage will depend on the size and scale of your project. Smaller projects will not need as complex a review process – but should still involve some level of review. The key areas to address are:

- **Evaluation** – making a judgement about the impact, values and outcomes of the project
- **Feedback** – either gaining information from stakeholders about their reaction to the project or giving information about a person’s performance which is then used as the basis for improvement.
- **Celebration** – taking time with the team and / or stakeholders to mark the end of a project. This builds morale and creates closure.
- **Handover** – some projects may be passed on to other people. E.g. if you designed a new system, you may teach people how to use it. Or you may let other staff members know about your project so that they can utilise the ‘lessons learned’ in their next projects.

## Evaluating a project

If you or a team have been carrying out a large piece of work (campaign, restructure, new product launch, marketing plan) then it is important to do some evaluation along the way in order to make adjustments – and a great deal more evaluation at the end. The purpose of evaluation is:

- to know whether goals and objectives were met
- to identify any best practice to be shared with others or repeated in future projects
- to identify changes or amendments for future projects

Most evaluations are done by asking and then reporting on a series of questions. Identifying the questions that you should address will depend on your context. Things to consider include:

- **The scale of your project** – delivering a one-day workshop will require less detail than a full year programme.
- **Are you evaluating for others?** – Sometimes you need to report to stakeholders, investors or the wider public. This may inform the questions you ask based on what they would most like to hear.
- **The need for independence** – some projects require evaluation by an independent assessor, especially if there is a chance of bias or recognised standards which need to be met.
- **Will you be repeating the project?** – if so then you will want to focus on data that allows you to improve it the next time around.

## Useful project evaluation questions:

### What progress did we make against our plan?

Most projects have a plan which sets out the goals, objectives, budget, timescales, delegation of roles and the intended project results. Compare the actual project outcome with the plan and report on successes, discrepancies and perhaps even any reasons for over or under achievement to help with adjustments next time.

### How do team members feel about the results?

Ask each member of the team to reflect on their levels of satisfaction with the plan, progress, process and results. This may also feed into ideas for what went well and what could have been improved next time.

### How do stakeholders feel about the results?

This will help you to check whether the process and results met (or even exceeded) stakeholder expectations. It also ensures their involvement in the process which is especially important when they are your funders or beneficiaries.

### What went well? What could have been better?

Capture the successes of the project in order to celebrate them and repeat them in future projects. Rather than being 'critical' & looking for what went wrong – use constructive language, noting what you would do to avoid issues in future or further improve the project.

### Resource use, time spent, people's roles, plan generation / implementation

For longer projects you may want to gather more detailed information about what went well and could have been better: Were the resources needed as planned? Did tasks take as long as estimated? Were people equipped for their roles? Was the brainstorming process effective?

### What was the impact of the project?

Impact is more about the long-term effects or behaviour change that come after your project ends. You may need to re-evaluate weeks or months later to measure changes in attitudes, habits or behaviours as well as ripple effects in the wider community. Some impacts may be quantifiable (e.g. reduced number of complaints filed) and others may be qualitative (e.g. stakeholder reports of feeling more confident).

### What were the lessons learned?

Drawing together all of the evaluation data should lead to a summary of lessons that your team learned. Some may be specific to this kind of project and others may be more general about teamwork, consulting others, fundraising etc. These should be collated in an accessible place so that they can be utilised in future projects.

## Gaining stakeholder feedback

Most projects, campaigns and services involve stakeholders somewhere along the way. It is important to gain their opinions at different stages of the process:

- **Before** – to gather ideas or support, to seek funding
- **During** – to be democratic, participatory and engaging. To demonstrate accountability
- **After** – to know whether a project met stakeholder needs and to demonstrate accountability

**Questionnaires & Surveys** – this is an obvious and easy way to gain quick feedback. Tick boxes, scales and numbered ratings can easily gauge satisfaction or other quantifiable information. Open ended and descriptive questions can ask for ideas, improvements and impact descriptions.

**Rating, Voting and Reactions** – shorter than a full survey, these allow stakeholders to quickly choose between a number of options, show their preferences or rate their satisfaction with something. It can guide decision making easily but will not provide an explanation of people's reasons for their choice.

**Interviews** – for more in-depth idea generation or impact analyses you may want to use 1:1 interviews to gain rich data. This will need to be captured through note taking and summarising. This is time consuming but useful for long term transformational projects.

**Discussion groups** – this is less time consuming than interviews as you can meet multiple people at once to hear their ideas, suggestions and impact stories. However, group settings could mean differences in confidence levels when speaking and peer pressure to respond in a particular way or participants influencing each other. The data will need to be captured through note taking and summarising.

**Hustings / Panels** – when speakers present their ideas, manifestos, projects or information there is usually an opportunity for audience members to submit questions and discuss the topics further. This can provide feedback about stakeholder concerns, ideas for action and their feelings towards the ideas presented. More confident people are likely to speak up so you may not get representative opinions. You could combine this method with ways of surveying the audience to get more people involved without needing to speak up.

**Feedback games** – in group settings where you want things to be dynamic you may want to use movement, play or creativity to support the feedback process:

- **Snowball** – people write short feedback on a note (top ideas, biggest challenge etc) screw it up into a ball and then throw them around like a snowball fight. Then pick up a new note and read it out loud for the group. This creates movement and randomises the location of feedback responses.
- **Word cloud** – for short feedback like how people are feeling or what they learned you can use digital word clouds to represent the most popular answers. You can manually do this with sticky notes and pens.
- **Sociogram / scales** – digitally or in the physical space you can give statements where people can strongly agree, strongly disagree or anything in between. People can score themselves visually on the scale and you can ask a few people to verbally explain their reasoning.
- **Freeze frames** – you could invite people to come up with a gesture / movement that captures their core feeling or opinion about something. Then invite them to show their freeze frame and explain it. This is time consuming but gets people moving and encourages creative thinking
- **Mood cards** – spread out a range of very different picture cards on the floor. Ask participants / stakeholders to select a card that most represents how they feel / what they think about your project. Then invite them to explain why they chose that picture. This can encourage rich and creative responses.

## Evaluating a person

If you or a team have been working on a project then it is important that each person has some sense of how they performed in order to:

- Hold people accountable to the role they play and the commitments they made
- Celebrate and reinforce good practice and performance
- Educate and support people on areas for development
- Value the career development journey
- Follow HR procedures, especially those around managing performance

### **Tips for the evaluation process:**

- Set goals and standards up front about what needs to be done, in what manner and to what standard. Having clear expectations improves people's ability to perform.
- Take notes along the way. You may give feedback as you go but can also use the notes in future performance management discussions.
- Don't compare people to others – this can lead to conflict, discrimination and other problems. Instead, compare people to the agreed standards, their own goals and targets and their past performance.

### **Useful evaluation questions:**

- Did they meet the goals set?
- How much has their performance improved?
- What is the quality of their work?
- Are they on time / on budget?
- How well do they work with others? With stakeholders?
- What is their style of working? How does this affect performance?

## Giving feedback

Everyone will have their own style of giving feedback. Here are some general principles which help to make sure that your feedback is good quality.

**Start with the positives** – if you begin with a negative (you need to improve \_\_\_) that can sometimes affect the other person's confidence. Begin with the positives so that people feel cared for, supported and ready to grow from feedback.

**Balance positives and challenges** – People need a mixture of positives to build confidence and celebrate and to be aware of their areas for growth. One model is to use the feedback sandwich where you begin with a positive, state an improvement target for the future and end on another positive.

**No buts** – Using the word 'but' when giving feedback has a negative impact on the listener as they usually discount all of the positives you just shared. Get rid of 'but' in a number of ways:

1. Use two separate sentences. "I liked your slide design but thought there were too many of them" becomes: "I liked your slide design. (pause) I thought there were too many slides"
2. Use and to build on your ideas: "Your event was really popular with students ~~but~~ **and** I'd like us to review the budget."
3. Use now or next to focus on the future. "Your project idea looks great ~~but~~ **next** I'll need you to complete a risk assessment."
4. Or if you are going to use but then put the negative at the start of the sentence: "You'll need to add more skills to this CV but your employment history is clearly tailored for this role."

**Timeliness** – Feedback is useful as soon as possible after an event or behaviour so that the situation is fresh in everyone's mind and that it can be acted upon sooner.

**Be empathetic** – Feedback is a two-way process. As well as communicating to the other, you can be considering their feelings and perspective and actively listening to their responses.

**Be constructive, not critical** – All feedback can be stated in a negative or a positive way. For example: "You were too quiet, we couldn't hear you." versus "You need to speak louder so that your instructions are clear." They both address the same point but the second feedback tells the person how to improve in future.

**Encourage self-reflection** – Use effective questioning to help the other improve their ability to reflect. Before giving your feedback, you can ask them to evaluate their own performance and reflect on their own strengths and areas for improvement. SMART questions can also be used to self-reflect and generate an action plan.

- What do you think went well?
- What would you like to improve for future?
- I noticed ... - what was going on for you?

**Be Specific.** – Give concrete examples of the behaviour that you saw or would like to see.

**Separate people from their behaviour** – we may give feedback that assigns labels to a person or comments on their personality. Instead, we should focus on their actions. (Aim to use verbs rather than adjectives)

A helpful technique for being more specific and achieving separation is  
“When THIS then THAT.”

Sometimes we can give vague or blaming feedback such as

1. “You were boring”
2. “You upset the participants”
3. “You made me feel nervous”

Good feedback recognises how specific choices and behaviours can lead to outcomes.

1. “When you explained the instructions for 10 minutes participants seemed bored.”
2. “When we discussed domestic violence, I felt that participants were more upset than we planned for.”
3. “When you interrupted me a few times I started feeling nervous that I was doing it wrong.”

**Focus on a solution** – with each of the examples above, they only explain the problem. It is important to move towards a solution or goal by:

- Asking them what solutions / actions they could implement to improve
  - Giving them advice / telling them your ideas on how they could improve
  - Framing your feedback as a suggestion or question for them to explore
1. “Could you make the explanation shorter, or use actions / movement to keep the audience engaged?”
  2. “Maybe next time we run this session we need to have a stronger explanation at the beginning so that participants know what to expect. Are there other ways we can manage their emotions?”
  3. “It would help me if we had a signal that I need to make a change, rather than you interrupting whilst I speak.”

**Separate facts and opinion** – We want to be careful not to treat our opinions as factual and end up judging the other person. Separating the person from their behaviour is a good start.

When you do want to share your own opinion or perspective you can use “I statements” to make clear that it is your own idea / perspective / preference rather than a judgement of the other.

“Your presentation was boring.” > “I engage more when there are some graphics on slides”  
“You were being bossy.” > “I didn’t like being given a list of tasks at the start of the meeting.”  
“You are disorganised.” > “I prefer to plan my meetings at least two days in advance.”

**Value process over results** – When you praise or criticise the end result of someone’s work it sends a message that the results are what matters most. This can lead to people avoiding risks, cheating, developing perfectionism or coasting if they can achieve results easily.

Whilst you may want to comment on the end result, make sure to also value and give feedback on HOW those results were achieved. This includes the effort and time spent, the processes people engaged in and people’s attitude. Feedback on the process encourages more learning and improvement for next time.

- This is an excellent report > You worked really hard to produce this excellent report
- Your sales targets are at 35% > You made fewer sales call this week and so you hit 35%
- The project launch failed > You brainstormed three ideas and selected one that turned out not to be viable

**Offer help** – To create really strong cultures of learning and growth, team members could offer support to each other as part of the feedback process.

- Giving advice / solutions
- Shadowing opportunities
- Mentoring
- Recommending resources
- Paired practice
- Adjusting ways of working together

**Set clear expectations** – Make sure the recipient understands exactly what is expected of them moving forwards (if there are any specific goals).

**Follow up** - Check in or review the feedback at a suitable time to see how they're progressing, celebrate and set further actions to help them develop.

**Respect privacy** - If feedback is sensitive or personal, make sure to deliver it in a private setting to respect the individual's privacy and dignity.

**Records** – Encourage individuals to make a note of their feedback to use it in future. Formal feedback may need to be kept in an employee record.



	<b>Keep satisfied</b>	<b>Manage Closely</b>
<b>High</b>		
<b>Power level</b>		
<b>Low</b>		
	<b>Monitor</b>	<b>Engage</b>
	<b>Low</b>	<b>High</b>
	<b>Interest Level</b>	



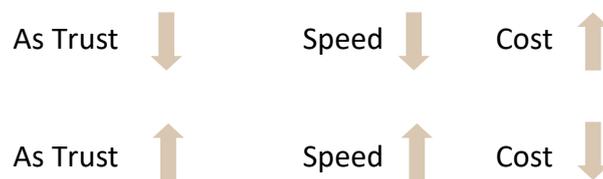
# Being a Trustworthy Leader

**“The most essential quality for leadership is not perfection but credibility. People must be able to trust you.” - Rick Warren**

**“Leadership requires followership and following is an act of trust, faith in the course of the leader, and that faith can be generated only if leaders act with integrity.” - Lawrence M. Miller**

We have already identified that leadership is a relationship between leaders and followers that is usually about the attainment of goals through periods of change. Because it is a **relationship** (not just a position) it relies on a foundation of trust to be effective.

In his book, *The Speed of Trust*<sup>14</sup>, Stephen Covey suggests that the level of trust in a business relationship can measurably affect business performance outcomes:



## As trust decreases:

- The speed of communications and outputs goes down because people spend more time checking the process, they are less committed and they are perhaps more sceptical.
- This means the cost of work goes up due to the extra time and checks taken.

## As trust increases:

- The speed of communications and outputs goes up – people collaborate and synchronise to get things done efficiently without much questioning.
- This means the cost of work goes down because people are efficient.

It is therefore vital for business success that leaders cultivate their own trustworthiness, and that of their organisation in order to be able to carry out their objectives effectively.

## Building personal trust – the emotional bank account

The **Emotional Bank Account** (or Relationship Bank Account) is an idea developed by Stephen Covey<sup>15</sup>. Instead of measuring your finances, the Emotional Bank Account is a measure of trust between you and another person. You ‘open’ an **EBA** with every person you meet – even strangers. The way you behave towards others, speak and treat them determines whether you make deposits or withdrawals into their account.

<sup>14</sup> Covey, S. M. R., (2008), *The Speed of Trust: The One Thing That Changes Everything*, London, England: Simon & Schuster.

<sup>15</sup> Covey, S. R. (1989). *The Seven Habits of Highly Effective People*. New York: Simon and Schuster.

The way you behave towards others, speak and treat them determines whether you make **deposits (build up trust)** or **withdrawals (reduce the trust)**.

An effective leader is mindful of this and consistently behaves in ways which build trust.

WITHDRAWALS	DEPOSITS
Negative behaviours and interactions which reduce trust.	Positive behaviours and interactions which build up trust.
<ul style="list-style-type: none"> <li>• Gossiping behind someone’s back</li> <li>• Being rude or abrasive</li> <li>• Ignoring people’s contributions</li> <li>• Letting people down / breaking promises</li> <li>• Being out for yourself</li> </ul>	<ul style="list-style-type: none"> <li>• Listening empathetically</li> <li>• Appreciation / complements</li> <li>• Recognising someone’s work</li> <li>• Keeping a commitment</li> <li>• Help / support</li> </ul>

Having a high level of trust in your relationships with team members and followers is a key ingredient to harmonious communication and teamwork. When trust is high, people feel they have the room to be vulnerable, make mistakes and collaborate together. When trust is low people get defensive, hostile, competitive, demotivated and pessimistic.

### The importance of trust

When you make a lot of deposits with another person (acts of kindness, attention, manners etc) then you build up a good level of trust with them. This gives you some leeway if things go wrong. If you have an excellent relationship with a client or friend then they will often overlook you being late to call them or maybe even a snappy comment on a stressful day. Those things may make a small withdrawal, but they will not damage the relationship too severely.

However, if you are already low on trust, or even have a negative balance with someone because of recent arguments and broken promises then the same late phone call or snappy comment could result in a full argument because people feel disrespected, misunderstood or undervalued.

Having a high level of trust in your relationships with others is one of the key ingredients to harmonious communication. When trust is high people feel they have the room to be vulnerable, make mistakes and work things out together. When trust is low people get defensive, hostile and even expect the worst.

## **Building trust – making deposits**

Stephen Covey identifies six major categories of deposits that you can make to build trust in the emotional bank account. The categories are explained below along with examples:

**Understand the individual** – taking time to understand someone else shows care and commitment. It also allows you to know what makes a deposit in their world. Not everyone will appreciate a bunch of flowers or being cheered up with a slice of cake. Get to know their likes, hobbies and values in order to be able to treat them how they want to be treated, rather than guessing based on your own preferences.

- Listen and empathise
- Ask questions to find out about them more
- Know what kinds of ‘deposits’ work for them
- Get used to their communication preferences & style
- Celebrate successes and growth with them
- Take an interest in their hobbies
- Ask for their advice or input
- Be patient with them

**Attend to the little things** – Occasionally making a grand gesture like a gift or trip is often not as valuable as lots of little actions such as listening to someone’s day and bringing them a cup of tea. Little things, done consistently, give the other person the message that you are thinking about them and care for them. This builds trust more steadily than fewer big things.

- Greet people, check in
- Be proactive with your relationships – get in touch
- Say thank you
- Remember their birthday or significant events
- Make someone a drink
- Give sincere compliments & praise
- Ask them if they need anything
- Give compliments and praise to their superiors and peers

**Keep commitments** – When you say you will do something it is important that you do. This lets the other person know that your word can be relied upon. Breaking promises is one of the quickest ways to break trust so if you realise you cannot keep up a commitment it is important to clearly and kindly explain why and, if possible, reschedule or adjust the promise so that you can still keep part of it.

- Be on time
- Complete tasks when and how you said you would
- Respond to communications in reasonable time
- Take promises seriously
- Ask for feedback and act on it

**Clarify expectations** – People trust each other when they know the expectations This may be agreeing your role in a job, deciding who will do the cooking, when you will call someone. If expectations are not clear then people may start to guess (I thought it was your turn to wash up) and this can result in people miscommunicating, arguing or feeling disrespected.

- Ask who, when, where and how to create clarity
- Put serious or complex agreements in writing
- Generate plans together so everyone agrees and understands their roles

**Show personal integrity** – Over and above keeping your promises, you build trust by being a generally trustworthy person. For example, someone who has kept all of their promises to you but who you know gossips about others and tells people’s secrets may seem untrustworthy – you may question whether one day they will betray you. Making sure that you are always honest and behave consistently no matter who you are with builds trust.

- Do the right thing whether people are looking or not
- Avoid gossip
- Challenge lying, cheating and gossiping in others
- Tell the truth even when it leads to a challenging conversation

**Apologize sincerely** – There will be times when you do make withdrawals. Being able to say sorry and mean it is important for reducing the size of the withdrawal and building the trust. Some people mix up explaining what happened with justifying it, which actually lowers the trust.

- Admit when you have made a withdrawal
- Give a genuine apology and use phrases like ‘I was wrong’ or ‘I did X to you’
- Avoid ‘justifying’ what happened
- Find a way to put it right

**Which of the types of deposits do you want to work on in your life? Your project? How?**

## Trustworthiness assessment

The following four-part tool is taken from Covey’s book, *The Speed of Trust*. Each part analyses a different part of trustworthiness which will be explained later.

For each line of the table circle a number from 1-5.

1 shows that you fully agree with the statement on the left.

5 shows that you fully agree with the statement on the right.

### Part One

I sometimes justify telling “white lies,” misrepresent people or situations, or “spin” the truth to get the results I want.	1 2 3 4 5	At every level, I am thoroughly honest in all my interactions with others.
At times, there’s a mismatch between what I think and what I say, or between my actions and my values.	1 2 3 4 5	What I say and do is what I really think and feel; I consistently “walk” my “talk.”
I am not fully clear on my values. It’s difficult for me to stand up for something when others disagree.	1 2 3 4 5	I am clear on my values and courageous in standing up for them.
It’s hard for me to acknowledge that someone else may be right, or that there is additional information out there that may cause me to change my mind.	1 2 3 4 5	I am genuinely open to the possibility of learning new ideas that may cause me to rethink issues or even redefine values.
I have a difficult time setting and achieving personal goals or commitments.	1 2 3 4 5	I am able to consistently make and keep commitments to myself and to others.

### Part Two

I don’t really care that much about people, except those closest to me. It’s hard for me to think about concerns outside of my own challenges in life.	1 2 3 4 5	I genuinely care about other people and am deeply concerned about the wellbeing of others.
I don’t think a lot about why I do what I do. I’ve rarely (if ever) tried to do deep interior work to improve my motives.	1 2 3 4 5	I am consciously aware of my motives and I refine them to make sure that I’m doing the right things for the right reasons.
In my dealings with others, I usually focus on getting what I want.	1 2 3 4 5	I actively seek solutions that provide a “win” for everyone involved.
Based on my behaviour, most people wouldn’t necessarily think I had their best interests in mind.	1 2 3 4 5	Other people can clearly tell by the things I do that I really do have their best interests in mind.
Deep down, I believe that if someone else gets something (resources, opportunities, credit), that means I don’t.	1 2 3 4 5	I sincerely believe that there is more than enough of everything to go around.

### Part Three

I feel like I'm not really utilizing my talents in my current job.	1 2 3 4 5	There is a high match between my talents and my opportunities in the work I'm doing.
I have not gained the knowledge or fully developed the skills I need to really be effective at work.	1 2 3 4 5	I have acquired the knowledge and mastered the skills required for my job.
I seldom take time to improve my knowledge and skills at work or in any other area in my life.	1 2 3 4 5	I relentlessly upgrade and increase my knowledge and skills in all the important areas of my life.
I'm not really sure what my strengths are; I'm more focused on trying to improve in my areas of weakness.	1 2 3 4 5	I've identified my strengths, and my greatest focus is on using them effectively.
At this point, I really don't know much about how to build trust.	1 2 3 4 5	I know how to effectively establish, grow, extend, and restore trust, and I consciously work to make it happen.

### Part Four

I don't have a very good track record. My resume certainly won't knock anyone's socks off.	1 2 3 4 5	My track record clearly gives others the confidence that I will achieve desired results.
I focus my efforts on doing what I've been told to do.	1 2 3 4 5	I focus my efforts on delivering results, not activities.
When it comes to communicating my track record, either I don't say anything (I don't want to come across as bragging), or I say too much and turn people off.	1 2 3 4 5	I appropriately communicate my track record to others in a way that inspires confidence.
I often fail to finish what I start.	1 2 3 4 5	With rare exception, if I start something, I finish it.
I don't worry as much about how I get the results—just that I get them.	1 2 3 4 5	I consistently get results in ways that inspire trust.

### Final Score:

Part	Core Aspect	My Score
One	Integrity	/25
Two	Intent	/25
Three	Capabilities	/25
Four	Results	/25
<b>My Total:</b>		<b>/100</b>

Scores **between 90-100** show high credibility and trust – you know what is important to you and put it into practice in daily life. You know your strengths and use them to help people and get positive results.

Scores **between 70-90** mean there are some gaps in your trustworthiness and credibility. It may be that you lack some trust in yourself (saying one thing but doing another or not standing up for your beliefs) or that it is difficult for you to gain the trust of others.

Scores **below 70** show a problem with your trustworthiness. This may make it hard for you to be confident in your own abilities and make others suspicious of you. If you scored below 70 then look at your low scoring areas and set behavioural goals to try and improve them.

### The four cores of trustworthiness

#### 1) Integrity

Most people think that integrity is the same as honesty. However, Covey argues that there are three aspects that build a person's integrity:

- **Congruence** – behaving in a way that is consistent with your inner thoughts and values.
- **Humility** – being humble means you will be more concerned about doing what is right / the best course of action rather than ego.
- **Courage** – acting in accordance with your values even when it's hard or you are a lone voice.

To increase your integrity:

- Make and keep commitments to yourself and others to increase your congruence.
- Stand for something. Know what your values and principles are and live them out every day.
- Be open minded – listen to others and embrace new ideas to develop humility.

#### 2) Intent

Again, there are three aspects that make up your intent:

- **Motive** – your reason for doing something.
- **Agenda** – what you intend to do because of your motives.
- **Behaviour** – the manifestation of motive and intent.

Those who benefit from the greatest levels of trust are people whose motives seek to help others from a place of genuine concern. This means that their agenda is about benefiting everyone in a mutual way rather than being self serving.

To develop your intent:

- Genuinely care for those around you and in wider society
- Seek out mutual benefits (a win-win or collaborative attitude)
- Regularly reflect on and redefine your motives
- Declare your intent to others to be transparent

### **Integrity + Intent = Your Character**

This means they form who you are as a person in general.

### 3) Capabilities

The acronym TASK is used to break down the different components of your capabilities:

- **Talents** - your natural gifts and strengths.
- **Attitudes** – your way of seeing the world and your way of being in it.
- **Skills** - the things we can *do* well.
- **Knowledge** - you're learning, insight, understanding, and awareness.
- **Style** - your approach and personality.

To develop your capabilities:

- Utilise your strengths by seeking out roles, projects and activities that require them.
- Keep yourself relevant by updating your knowledge and skills.
- Reflect and review on your attitude to keep it healthy. Effective leaders have attitudes of idealism, positivity, encouragement, open mindedness, persistence and collaboration.

### 4) Results

This core aspect means the measurable outcomes of your activities. This may be the work you produce, behaviour you have shown and your achievements. Most of this will focus on your past results as they build up a large part of your reputation – but it can also include your current performance and your anticipated future performance based on your current goals, attitude and capabilities.

People will have greater levels of trust in leaders who have already been able to prove that they have been able to achieve the desired results – so rebuilding or improving this reputation can take time.

To improve your results:

- Take responsibility for results – this means acknowledging your part in bad results in order to build transparency as well as celebrating good results.
- Expect to win – by aiming high and having a positive attitude you will likely achieve better results in future.
- Be a finisher – some people start things and then give up. Persistence and resilience leads to better tangible outcomes.
- Communicate your results – celebrate the results you gain without being egotistical. Saying what your organisational impact is or celebrating the hard work of the whole team will reinforce your reputation.

### Capabilities + Results = Your Competence

This means they form how you perform in your role and how credible your work is.

Look at your scores on the four dimensions of trustworthiness.

**What did you notice about your integrity score? How might you develop it?**

**What did you notice about your intent score? How might you develop it?**

**What did you notice about your capability score? How might you develop it?**

**What did you notice about your results score? How might you develop it?**

# Team Activity

**How did your team perform?**

**What went well?**

**What could be improved?**

**What did this task show you about project management?**

# The Working Genius Model of Personality

This is a 6 type model devised by Patrick Lencioni<sup>16</sup> which focuses on the different kinds of roles people most prefer to play in the process of work. The model begins by outlining 6 types of work needed for any endeavour – creating a new product, delivering a campaign or even planning a family holiday. For any work to be effective, all six stages are needed:



**Wonder** – Identifying the need for change or an opportunity to do things differently.

**Invention** – Creating solutions and ideas in response to a problem / opportunity.

**Discernment** – Evaluating and refining ideas to help choose the one to take action on.

**Galvanising** – Rallying and motivating people to get behind a plan.

**Enablement** – Providing support and human capital to a project.

**Tenacity** – Overcoming obstacles to ensure tasks are finished to standard & deadline.

## Personality strengths – your genius

Once you understand the 6 types of work, you can then see how some people will be more drawn to different parts of the work process. By working with a number of teams and companies over the years Lencioni hypothesises that everyone has 2 working geniuses, competencies and frustrations.

**Working genius** – 2 areas that give us joy, energy and passion. We are naturally drawn to these and good at them. We flourish doing these.

**Working competency** – 2 areas that are neither joyful or miserable. We can do them well, and in some cases very well out of necessity and practice. But too long in these areas can lead us to be weary.

**Working frustration** – 2 areas that drain us of joy and energy. We struggle with this kind of work and as a result prolonged time on them can lead to feeling miserable or even burnout.

The main way of telling what kind of work is your 'genius' is to focus on how it affects your mood or energy.

<sup>16</sup> Lencioni, P (2022). The 6 Types of Working Genius. Matt Holt and BenBella Books.

People with the genius of **wonder**...

- Love to speculate, question and ponder
- Wonder if things could be different or if potential and opportunities are not being tapped
- Lose themselves in observing the world around them
- Think about context, big picture and big questions

People with the genius of **invention**...

- Have a gift for generating original ideas
- Get joy from suggesting solutions to challenges
- Love to work from scratch and brainstorm
- Create 'useful havoc'

People with the genius of **discernment**...

- Have good gut instincts, intuition and judgement
- Love evaluating and giving feedback on ideas and situations
- Think about the workability of ideas and refines them
- Sense patterns and connections to support judgement

People with the genius of **galvanising**...

- Naturally rally, inspire and motivate others
- Love getting things started and moving in the right direction
- Can persuade people to rethink or change their plans in order to work on something worthwhile
- Enlist people to deliver the work

People with the genius of **enablement**...

- Are great at providing encouragement and assistance to others
- Respond (and can even anticipate) the needs of others
- Love to help others accomplish their goals and so can flexibly do what is needed
- Are often the glue of a team – the first to step up

People with the genius of **tenacity**...

- Get joy from completing tasks and projects (and ticking them off!)
- Ensure things are done to specification and deadline
- Are good at tackling obstacles in order to get stuff done
- Love to see the end result / impact of the work

What are your **working geniuses** – 2 areas of joy, energy and passion.

What are your **working competencies** – 2 areas that are neutral.

What are your **working frustrations** – 2 areas that drain you and lead to misery over time.

## Using working genius in teams to drive change

The working genius model is useful for helping individuals to understand themselves – but it is even more useful in teams. Most work is carried out by a number of people who all have different roles to play – formally as part of their job title and informally in the way they like to operate.

A great way to understand your team and make strategic changes is to make a team map.

1. Get each team member to identify their working genius profile
2. Create a table where everyone records their 2 geniuses and 2 frustrations. Colour coding can be helpful. Lencioni does not recommend that you record competencies as well – genius and frustrations are more important to track.
3. Note that each person's name should appear 4 times
4. Review the map and see what you notice / review the reflection questions.

An example for a team of 5 people: Zahra, Raj, Chris, Ellie & Moh

<b>Wonder</b>		<b>Invention</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>
<ul style="list-style-type: none"> <li>• Zahra</li> <li>• Raj</li> </ul>	<ul style="list-style-type: none"> <li>• Chris</li> </ul>	<ul style="list-style-type: none"> <li>• Ellie</li> </ul>	<ul style="list-style-type: none"> <li>• Zahra</li> <li>• Chris</li> <li>• Moh</li> <li>• Raj</li> </ul>
<b>Discernment</b>		<b>Galvanising</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>
<ul style="list-style-type: none"> <li>• Zahra</li> <li>• Chris</li> <li>• Moh</li> <li>• Ellie</li> </ul>	<ul style="list-style-type: none"> <li>• Raj</li> </ul>		<ul style="list-style-type: none"> <li>• Ellie</li> </ul>
<b>Enablement</b>		<b>Tenacity</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>
<ul style="list-style-type: none"> <li>• Chris</li> <li>• Raj</li> </ul>	<ul style="list-style-type: none"> <li>• Moh</li> </ul>	<ul style="list-style-type: none"> <li>• Moh</li> </ul>	<ul style="list-style-type: none"> <li>• Zahra</li> <li>• Ellie</li> </ul>

Reflection questions:

- What are our team's strengths?
- What are our clusters of frustration?
- What are our gaps?
- How does the map explain our successes and challenges?
- Do we need to reallocate tasks to maximise genius / minimise frustration?
- Do we need to borrow people from other teams?
- Do we need to hire?

Once a team has reviewed the reflection questions it can provide useful actions for a team. If we take a look at the example...

**Strengths** – We can see this team is really good at evaluating ideas and picking the best course of action. We can celebrate this strength and even offer this as a mentoring / support mechanism for other teams.

**Frustrations** – Four of the five team members don't like invention. We now know that brainstorming sessions will be difficult for people and poor Ellie may find herself carrying most of that work. Long periods of inventing will get this team down and they will need breaks.

**Gaps** – No one has a genius of galvanising. Plenty of people are competent at it so they could get by, but without anyone who loves to motivate people things may stagnate. If any of the genius areas are empty then the impact of that gap can cause problems for your team.



**Wonder** – Failing to see the bigger picture, context or fully define the situation.

**Invention** – Teams use the same old ideas and plans.

**Discernment** – Over relying on data to make judgements & making bad decisions.

**Galvanising** – Great ideas don't happen because people aren't excited or on board.

**Enablement** – Teams get frustrated that no one pitches in to help and start things.

**Tenacity** – Projects don't get finished.

**Reallocations** – Loads of people are good at discerning. Only Ellie has the genius of invention and only Moh has the genius of tenacity. When dividing the work, we can give them a little bit less of the discernment work so that they can fully focus on the areas that only they do well. If lots of team members get frustrated by invention then if they are needed to do it, perhaps it can be on a roster basis so that they spread out their frustration and lose less energy.

**Borrowing people** – When it comes to inventing, galvanising or tenacity this team may benefit from ask someone from another team to lend a hand or even working with freelancers to plug gaps.

**Hiring** – if this team was to hire a new staff member, they may want them to have geniuses in Invention, Galvanising or Tenacity. (In addition to the qualification, work ethic and other necessities for the role). Working genius can also help you to communicate good job descriptions explaining the kinds of work most needed on the team.

## **Other ways to use working genius in teams**

**Manage your energy levels** – be aware of the types of work you are doing and the impact that has on your energy. Where possible reduce time in frustration and increase time in genius.

**Communication** – Using these 6 labels can help your conversations to be more purposeful. You can say “I’ve had some ideas, I’m looking for you to help me discern them.... Or I’m looking for your tenacity to make them happen.” When people know what you expect they can respond better.

**Patience and understanding** – knowing people’s genius and frustrations can help you be more empathic when people are struggling, more willing to help and more willing to compromise / collaborate.

**Your team map** - You can fill this out for your project team (or community group or family) to help you to understand some of the dynamics and changes that you can make to drive positive change.

<b>Wonder</b>		<b>Invention</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>
<b>Discernment</b>		<b>Galvanising</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>
<b>Enablement</b>		<b>Tenacity</b>	
<b>Genius</b>	<b>Frustration</b>	<b>Genius</b>	<b>Frustration</b>

**What did you notice about your own team?**

**What can you do to get the most out of your team?**

### Using working genius to have better meetings

Most work is done in the context of meetings – and meetings get a pretty bad reputation for being ineffective or boring. Much of this is because people have not taken the time to define the purpose of the meeting and ensure the ‘right’ kind of work is being done.

Lencioni suggests that there are 4 kinds of workplace meeting – and that each benefits from different geniuses.

The **brainstorming** meeting requires...

- Wonder to identify opportunities, problems, context
- Invention to generate ideas
- Some discernment to begin sorting ideas and prompt more

The **decision making** meeting requires...

- Discernment to evaluate ideas and push one forward
- Invention for any new ideas / refinements
- Some galvanising to get people on board

The **launch** meeting requires...

- Galvanising to get people on board and excited to start
- Enablement to start things off with whatever is needed
- Some discernment to help address questions and concerns

The **status review and problem solving** meeting requires...

- Tenacity to identify tasks and get stuff finished
- Enablement to bring in support
- Some galvanising to rally people to finish

Once you define the kind of meeting you are having you can drive effectiveness by:

**Setting clear goals** – people know what the outcome is. Ideas, a decision, finalising?

**Getting the right people in the room** – not every meeting needs every team member. Prioritise inviting the people who have the strengths to help reach the meeting goals.

**Giving people with geniuses a leading role** – Whether it’s their ‘job title’ or not you can leverage people’s geniuses. Zahra may be the administrator for the team but if she is great at inventing then tell her the challenge and ask for her ideas.

**Pre-warning those with frustrations** – We all need to be in meetings that don’t suit us at times. But if we are clear on the type of meeting and our frustrations then we can brace ourselves, be self compassionate or patient with others. Ellie may not like status review meetings but you ask her to attend just to hear where things are up to.

**Asking the right kinds of questions** – Make sure your questions are relevant to the outcome. If they are not then you can create turbulence. In a brainstorming meeting asking ‘How do we get this done?’ fast forwards to tenacity. If you are implementing a project you don’t want to ask wondering questions that pause the project.

**Key questions for each genius**

These are the types of questions you are likely to find each genius asking. If you know that your team has a gap for one of the genius areas then using this question sheet might help you to plug that gap.

<p><b>Wonder</b></p> <ul style="list-style-type: none"> <li>• What is the real problem we’re aiming to solve?</li> <li>• Why does this problem exist?</li> <li>• What’s currently working?</li> <li>• Why do we do things the way we do?</li> <li>• Why and why not questions.</li> </ul>	<p><b>Invention</b></p> <ul style="list-style-type: none"> <li>• What would make [x] better?</li> <li>• What’s a creative solution for this problem?</li> <li>• What if questions.</li> <li>• What would it look like if....</li> </ul>
<p><b>Discernment</b></p> <ul style="list-style-type: none"> <li>• Which of these plans should we try?</li> <li>• Is this the best this project/initiative can be?</li> <li>• Is this the right decision for right now?</li> <li>• What are the pros and cons of each option?</li> <li>• What will X, Y, Z look like in 6 months?</li> <li>• What are we not seeing?</li> <li>• Is there both long and short term gain?</li> <li>• How will this choice impact our other goals or priorities?</li> <li>• What are our criteria for decisions.</li> <li>• Have we considered all the details?</li> </ul>	<p><b>Galvanising</b></p> <ul style="list-style-type: none"> <li>• What will be this person/group's response to this?</li> <li>• How do we get the team bought in?</li> <li>• Who needs to know about this so we can move this project/initiative forward?</li> <li>• Do you have questions about why we’re moving in this direction?</li> <li>• Where do you still need clarity?</li> <li>• What method of communication would help get the point across?</li> <li>• Why is the idea relevant for X group?</li> <li>• Revisit the why - walk the people back through the previous stages</li> </ul>
<p><b>Enablement</b></p> <ul style="list-style-type: none"> <li>• How are people doing?</li> <li>• What would motivate this team member to push forward on their project?</li> <li>• How can I help?</li> <li>• Where are there gaps to fill?</li> <li>• Is this project or initiative clear to everyone involved?</li> <li>• Do I have helpful coaching tips to offer?</li> </ul>	<p><b>Tenacity</b></p> <ul style="list-style-type: none"> <li>• Who, what, how much, by when?</li> <li>• What is the next step in this project?</li> <li>• What is the most important things to do right now?</li> <li>• What does success look like?</li> <li>• What is our timeline?</li> <li>• Who needs to be involved?</li> <li>• Do we have enough resources?</li> <li>• What challenges do we need to overcome?</li> </ul>