

Lessons from the Wizard

Gandalf on Project Management



Overview

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Introduction

About Me

- **My Family**
- **My Work**
- **My Fun**

My Family

- **Married since '02**
- **3 kids (15, 10, 5)**

My Fun

- **Avid Reader**
- **Football fan**
- **Closet Philosopher**

My Work

- **BA from Messiah, '94**
- **MPA from PSU, '00**
- **Industries: Defense, Transportation, Finance, Energy**
- **PM for much of last decade+**



Learning Objectives

Becoming a wizened project manager involves more than surviving scope creep, producing metrics, managing costs, and explaining schedule variances.

Attendees will learn:

- **Techniques for forging integration;**
- **Communication with fewer words;**
- **Managing risk without killing your budget;**
- **Procuring resources with no funds;**
- **Managing stakeholders who oppose your project mandate**



Presentation Format

To make this useful; each topic contains questions and challenges to help you analyze, review, and evolve your practice into something better.

- **Question**
 - Ex.: Is herding cats what you really do?
- **Challenge**
 - Ex.: Can we set an archetype to follow/guide our Project work?



The Wizard as an Archetype

- **Origins:**
 - Wired magazine article analyzing Bilbo's contract with the Dwarves (<https://www.wired.com/2013/01/hobbit-contract-legal-analysis/>)
- **Definition:**
 - An original that has been imitated; a recurrent symbol or motif in literature, art, or mythology.
- **Purpose of an Archetype:**
 - Establish a pattern or model from which to build a model or prototype for action and behavior.



Relevant Archetype Characteristics

- **Gandalf Definitely Managed Projects...**
 - Help Dwarves retake homeland
 - Destroy the Ring
- **He Used a Unique Approach...**
 - Start with a party
 - Self-organized teams
- **Confronted Atypical Constraints...**
 - Magic orbs are not good communication devices
 - It's the end of the world as we know it
 - Stakeholder Dysfunction: the Boss wants to kill you; Elves \neq Dwarves, etc.



Archetype Cautions

- **Does not apply to all situations**
- **Often fail under close scrutiny**
- **May require a specific skill set**
- **Certain personality traits required**
- **Experience helps see past obstacles or inconsistencies**



Competing Archetypes

- **The Agilist**
 - Swears by Agile methodology and scoffs at “Waterfall” PMs
 - Might have been in Colorado when the Manifesto was written
- **The Scheduler**
 - Wields MS Project like a Samurai wields a katana
 - Quote: “If you schedule it, they will come.”
- **The Bean-counter**
 - Track every task to the penny
 - Quote: “We’re on budget, so the project is doing great!”
- **The Metric Guy**
 - Keeping the project on-track through mathematics
 - Quote: “My CPI will eat your project for lunch.”

Project Selection for Wizards



Project Selection for Wizards

Wizard's in Middle Earth kept watch on the Realm for trends, disturbances, and problems that will need to be solved in the future

Translation: submissions to the Project Governance Board should never (rarely?) be a surprise.



Project Selection for Wizards (cont'd)

- **Because projects involve people, they require care and nurture**
- **Because projects face risk, they require monitoring**
- **QuestionSpeed of information technology evolution requires agility:**
 - What are your Project Selection criteria?
 - Do they provide more than: ROI?



Gandalf's Project Selection Table

Proposed Project	Location	Project Sponsor	Risk (r)	Loot (l)	Societal Bene. (sb)	Project Score [r-(l+sb)]	Notes
Help Dwarves retake homeland	Erebor/ Lonely Mtn	Thorin O.	8	10	4	6	Dwarves= grumpy
Slay Dragon (Smaug)	Erebor/ Lonely Mtn	Thorin O.	10	10	7	7	Dragon=eats wizards Maybe Dwarves help?
Raise Army & Destroy Sauron	Mordor	White Council	10	1	6	-3	Army logistics ☹️ Mordor: hot & humid
Slay Balrog	Mines of Moria	Balin	7	1	2	-4	Mines: moldy; Balrog: likes whips
Conduct Ring Research	Minas Tirith	Sarumon	5	5	2	2	Libraries!
Dinner Party @ Bilbo's	Bilbo's Pad	Bilbo's	2	6	6	10	Old Toby!
www.theprojectwizard.com Annual Wizard Conference	Isengard	Sarumon	3	1	2	0	Isengard: cold; Boss: weird



The Wizard's Challenge

- **Do you measure your project success criteria?**
- **Can you measure them?**
- **Are they accurate?**
- **Do your projects provide more than ROI?**

The Wizard's View of Project Constraints



Constraints - the Traditional View

Typical analysis is useful...

- **Time - still a factor (the end of the world as they knew it was nigh)**
- **Cost - travelling & staff costs money**
- **Quality - stop the enemy or not**

...but not as much of a factor as you might think

- **Time - *always* a factor**
- **Cost - who really foots the bill?**
- **Quality - security, aesthetics, and other intangibles, must be built in**



Gandalf's Constraints

- **Market Speed - end of the world**
- **Stakeholder Dysfunction (#whenyourbosstriestokillyou)**
- **Communication Channels – F2F and smoke signals**



The Wizard's Challenge

What other constraint paradigms exist to help with project analysis?

- **Disney:**
 - Safety
 - Quality
 - Aesthetics
- **Military:**
 - Security
 - Safety
 - Responsibility

Challenge: what other factors contribute or limit project success?

Gandalf's Challenge:

- **Market Speed - end of the world**
- **Stakeholder Dysfunction (#whenyourbosstriestokillyou)**
- **Communication Channels – F2F and smoke signals**

The Wizard's Toolkit



The Wizard's Toolkit

- **The Wizard serves multiple PMOs:**
 - Deity
 - White Council
 - Personal, moral compass
- **Sometimes competing priorities**
- **Always the highest priority**



What's In Your...Toolkit

- **Most organizations have their own methodology...**
- **What are the common KAs that everyone has in their custom/bespoke methodology?**
- **Typical Corporate PM Playbook**
 - Schedule
 - Cost
 - Quality
 - Risk
- **What's missing?**



The Wizard's Toolkit

- **Stakeholders**
- elves, dwarves, hobbits, sorcerors; talk about cross-cultural issues!
- **Communication**
 - Magic orbs don't always work
- **Human Resources & Procurement**
 - If you don't target a skill, personality, ability, or talent, you'll get what you asked for
 - Make use of the inter-personal capital to acquire/build the resources you need
- **Risk**
 - You will face it; be ready to exploit
- **Integration**
 - A longer-term view clarifies the relationship between project phases, projects, and programs



Stakeholder Management

"Many are the strange chances of the world," said Mithrandir, 'and help oft shall come from the hands of the weak when the Wise falter." –Gandalf, J.R.R. Tolkien (Christopher Tolkien ed.), Of the Rings of Power and the Third Age, The Silmarillion

Faction	Sub-faction	Leader	Culture	Handling
Humans	Dunedain	Aragorn	Wise, Loyal, Strong	Open svc contract; don't let it run out
Humans	Rohan	Theoden	Energetic, Fierce, Wild, Protective	Don't interfere unless necessary
Humans	Gondor	Steward	Wise, Loyal, Secretive	Firm but tread lightly due to sensitivity about ownership
Elves	Lorien	Galadriel	Secretive, protective	Keep informed
Elves	Rivendell	Elrond	Secretive, protective, independent	Keep informed
Elves	Mirkwood	Thranduil	Secretive, Angry, Untrusting	Use only when necessary
Dwarves	Erebor	Dain II Ironfoot	Loyal, secretive, hard-working, dour, hot-headed	Use for tasks
Dwarves	Moria	Balin	Hard workers	Dead?
Hobbits		N/A	Happy, Strong	Party often (Mushrooms, Old Toby!)



Communication Management

- **Always face-to-face**
- **Often enough that the recipient may already be aware of what is coming**
- **As above: knows his stakeholders so knows how to handle the recipients**
- **Magic Orbs have a way of not conveying the right message**

Human Resource & Procurement Management



- **Combined for a reason...**
- **Human resources are always procured - even if they come with the project**
- **The Wizard accomplishes this through interview and subtle inquiry**

"I am looking for someone to share in an adventure that I am arranging, and it's very difficult to find anyone."

–Gandalf; J.R.R. Tolkien, An Unexpected Party, The Hobbit



Integration Management

- **What does this one do?**
- **Definition: “...the processes and activities needed to identify, define, combine, unify, and coordinate the various processes and project management activities within the Project Management Process Groups...entails making choices about resource allocation, making trade-offs among competing objectives..., and managing the interdependencies...”**
- **Keywords here...Coordinate, Unify**



The Wizard's Challenge

- **What KAs are in your toolkit?**
- **How do they push the project forward?**
- **How do they prepare you for the next project?**

The Agile Wizard



The Agile Wizard

- **Agility in projects is more than just a principle or mantra, or something to shoot for.**
- **Agility is a trait that must be trained, tested, developed, and exercised in order to be available or useful.**

For the Wizard, Agility is

- **A mind-set - knowing that change will occur and adapting**
- **Communication - relying on frequent interaction rather than plans**
- **Collaboration - let the professionals do the work**
- **Act - when others want to “wait and see” or “debate”**



Principles to Extend Agility

- **Nurture for your team**^(People)
- **Welcome change**^(Method)
- **Deliver Frequently**^(Goals)
- **Rely on others**^(People)
- **Select motivated individuals**^(People)
- **Face2Face – only option**<sup>(People/
Communication)</sup>
- **Communicate progress**^(Communication/Goals)
- **Coach a sustainable pace**^(People)
- **Be mindful of key details**^(Goals)
- **Keep approach simple**^(Method)
- **Let the team build itself**^(People)
- **Reflect & Adjust**^(People/Goals/Communication/Method)



Lessons for the Real World

Among the challenges that Gandalf, and JRR Tolkien, offer to the modern world, and the modern Project Manager, are these:

- **Are you managing your staff as if they were actual people and not, “resources”?**
- **Is your methodology so rigid that you hyper-focus on specific aspects of project management and lose sight of processes that add value?**



Lessons Continued

- **Are you conquering risks, or are you just listing them?**
- **Are your project constraints based on lazy analysis or are you really studying your project environment?**
- **Are you selecting projects based merely on financial return or on something more altruistic and, ultimately, more beneficial to your employees and their environment.**

Finally...



*"It is not our part to master all the tides of the world, but to do what is in us for the succour of those years wherein we are set, uprooting the evil in the fields that we know, so that those who live after may have clean earth to till. What weather they shall have is not ours to rule." –Gandalf;
J.R.R. Tolkien, The Last Debate, The Return of the King*

Questions & Discussion

Where To Find Me

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Thanks for your time.