

Build and support exceptional teams

Advice for collaborative success from experienced project managers



Introduction

Project managers have some of the toughest jobs in any industry.

After all, 90 percent of today's companies face problems so complex that teams are essential to solving them¹. The good news—in theory—is that with so many digital tools and communication methods available, it's never been easier for project managers to facilitate teamwork.

In practice, however, less than 70 percent of workplace projects meet their initial goals or intent². That's shocking, given how many tools are available to help project managers meet these goals. And while different industries and companies adopt these tools on varying timelines, a crucial component of any project's success—teamwork—is getting harder to come by.

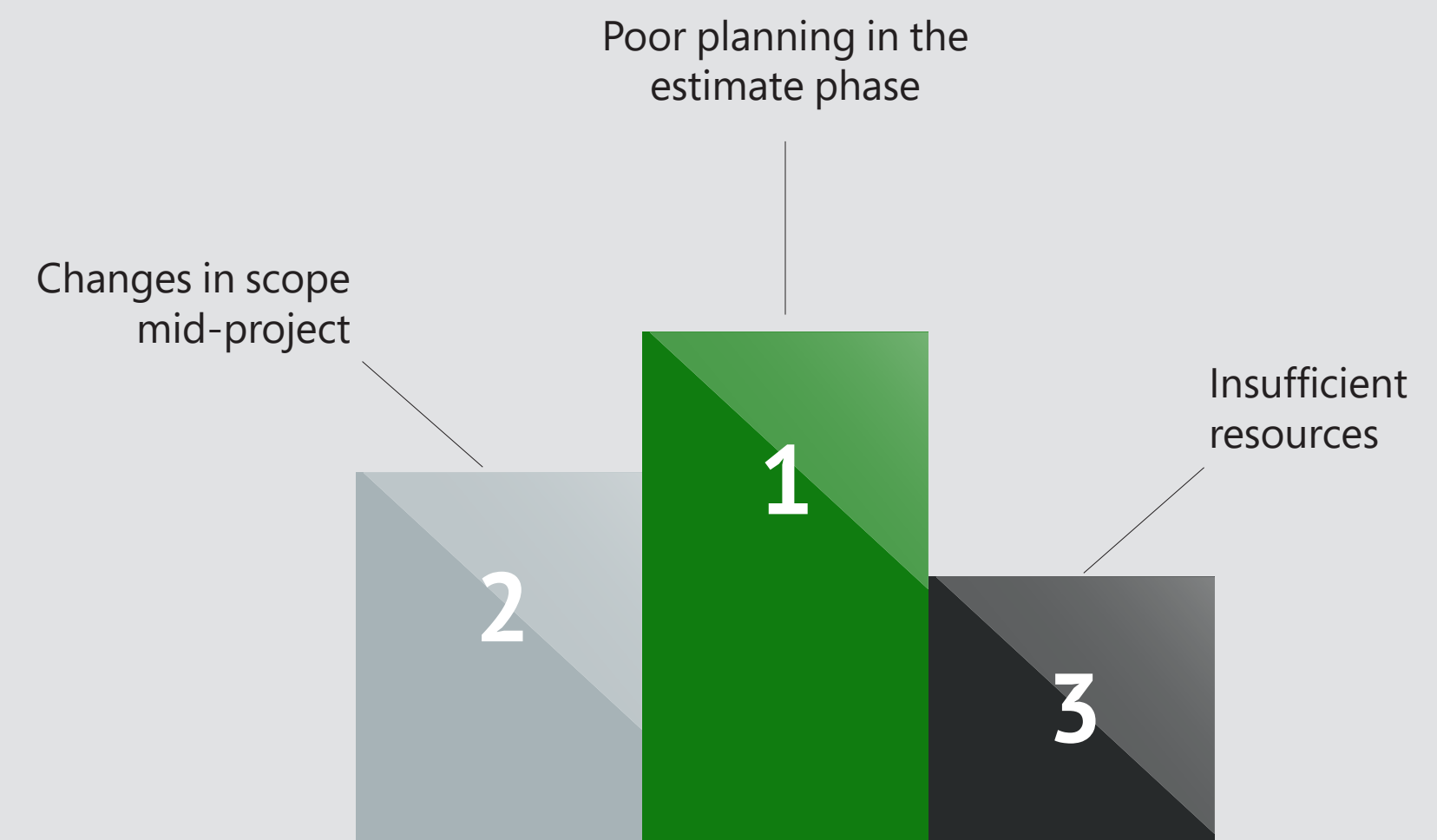
Tackling complicated business issues takes a team, and building a highly functioning and happy team takes foresight and finesse. This guide is compiled from interviews with seasoned project managers about their personal experiences on the job. *Interviewees may not be current Microsoft customers, and any quote or information provided is not intended to serve as a testimonial or endorsement with respect to any specific Microsoft product.* It explores easy and effective ways to facilitate the kind of collaboration and flexibility that successful projects need.

Chapters

- 1 Lay the groundwork for success
- 2 Establish yourself as a leader your team can trust
- 3 Foster collaboration between teammates
- 4 Mitigate risk through planning and communication
- 5 Adopt tools that help your team work smarter

1. Ernst and Young's The Power of Many, 2013
2. PMI's Pulse of the Profession, 2017

Consistent top-three reasons for project failure since 2004



SOURCE: 4th Global Portfolio and Programme Management Survey, PwC

01

Lay the groundwork for success

These initial steps have a significant impact on how successful your project will be:

- A kickoff meeting with the right core team
- Role and purpose clarification
- Solidifying timeline and resourcing

Your kickoff meeting is critical. In some cases, it's the first time everyone on the project will be together. In every case, it's the best time to clarify any confusion and ensure everyone has what they need to move forward together.

Put the right people in the room

The first step of a successful project is one of the most important—ensuring the right people are in the room. Lauren Soto, a senior project manager for an outdoor retailer, agrees. “The most successful projects I’ve run can be attributed to good, upfront plan-

ning—taking the time to think through and document the details, plan, work together—and a great team. If the team is cohesive, excited, and works well together, the project will work as well.”

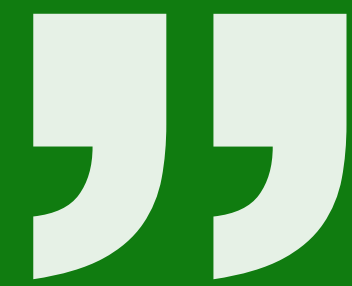
That human element is crucial in a project's early stages. When Tess Calvert, a portfolio manager for a public research university, looks back at successful projects she's managed, the main ingredient for success was the team. “We didn't want to let each other down. We had great attitudes, which made it fun, and we were in constant daily contact.”

“When you have the opportunity to do so, choose your team wisely. My favorite teams are full of people who can do great creative or development work, but also can police themselves in some way. I would look for self-starters, good communicators, and people who ask the right questions to complete their work.”

LIZ McNEIL

Senior Project Manager,
at a creative marketing agency





My role is to be sure we have a solid brief and what we need to successfully kick the project off, remove any barriers along the way so that the team can do their best work, manage all of our review venues, and communicate status at all points in time.”

WENDY FERNANDEZ

Digital Producer,
at a global coffee retailer

Clarify the roles of everyone involved

Once your team is in place, establish responsibilities. Make sure everyone knows what they’re delivering to the project and how they contribute to the end result. For large teams, get a solid understanding of each stakeholder’s collaborative role in the planning and review process.

“You’ve got to identify who are the key decision makers, versus who are the ‘inform,’ versus who you need to get to change their behavior. You create a stakeholder analysis.”

CHRISTINE YEAGER

Senior Manager,
at a global beverage company

One way to help identify roles is with a RACI (Responsible, Accountable, Consulted, Informed) matrix, which assigns levels of responsibilities to team members by deliverable. A well-built RACI matrix determines how the team works and what’s expected of everyone. This can include deciding who on the team is client facing, how work is shared internally and externally, how the team will communicate day-to-day, and when and how issues should be escalated. This is a key step to making sure the intent of the project is met in the end deliverable.

“Nothing could be worse than delivering a product that does not meet the client’s vision. Yes, delivering a project late or over budget is also a fail; however, the biggest fail is missing the target.”

ANGELA SPEER

Head of Project Management,
at a top tier consulting company

During the kickoff, outline what needs to be achieved and ensure unanimous agreement. Make sure each member understands the larger “why” behind their contributions, so they do their best work and stay engaged for the long haul.

Agree on a detailed timeline

Once everyone's working towards the same goal, it's time to construct a roadmap. Ensure that a master schedule is agreed on by all parties, so team members can be held accountable. This is particularly important on projects where there are many contributors, as each deliverable usually requires input from others. To keep the team aligned and informed on the schedule and timeline as the project moves forward, consider investing in a project management tool that gives everyone a view into those details.

"Bringing in the stakeholder during the early stages, and taking them along the way, promotes a trust and partnership that can make the work come to life more quickly and correctly if done right. Creating a very detailed timeline and project plan—and having buy-off from the working team and client at the time of kick-off—is also critical."

WENDY FERNANDEZ

Digital Producer,
at a global coffee retailer

Clarify resource requirements and set expectations

A firm schedule also helps clarify what kind of resources the team will require. Incorrect assumptions early in the game can pose risks down the road. "Requirements are key to success," says Soto. "They help you and your team adequately scope and resource the project, provide a framework to manage back to as the project progresses, and give you something to key off when referencing the project in the future."

Brandon Ruez, a project manager at a large construction company, agrees. "The reason you do miss those dates or you do go over budget, is how you're documenting the project. It's how you make sure your budgets are reflective of the project."

Collaborative teams decide, right up front, what to expect from each other, says Lauren Childs, a senior producer for a global coffee retailer. "I think this helps build a shared sense of responsibility, and it helps everyone understand what they're helping contribute. ... It's much easier to adjust and stay nimble if you're initially working from something everyone is in agreement around."



02

Establish yourself as a leader your team can trust

A team will only function as well as its leader. Make sure that you:

- Show that you're willing to do what's necessary
- Establish effective authority
- Balance team growth against micromanagement
- Create an atmosphere of positivity

"If the team doesn't trust you, you won't be able to fully understand the health of the project. The more difficult the issue, the more important it is for the team to trust each other and be candid with their progress, issues, concerns, and help needed."

TESS CALVERT

Portfolio Manager,
at a public research university

Facilitating great teamwork starts with leadership—and the leader isn't always the most senior person on the team. It's often the person with the sharpest view across all facets of the project—the project manager.

But trust is earned. Proving to the team that you're by their side will go a long way. "To get people to follow you, you have to show them you've done it—that you've done their position before, you're willing to do it again, and do whatever it takes," says Ruez.

That doesn't mean a project manager should have to do everything all the time—it just means that when the chips are down, teams will rally around the members who are most willing to go the extra mile for their peers. Leading by example is the best way to generate that outcome.

Build trust by being effective

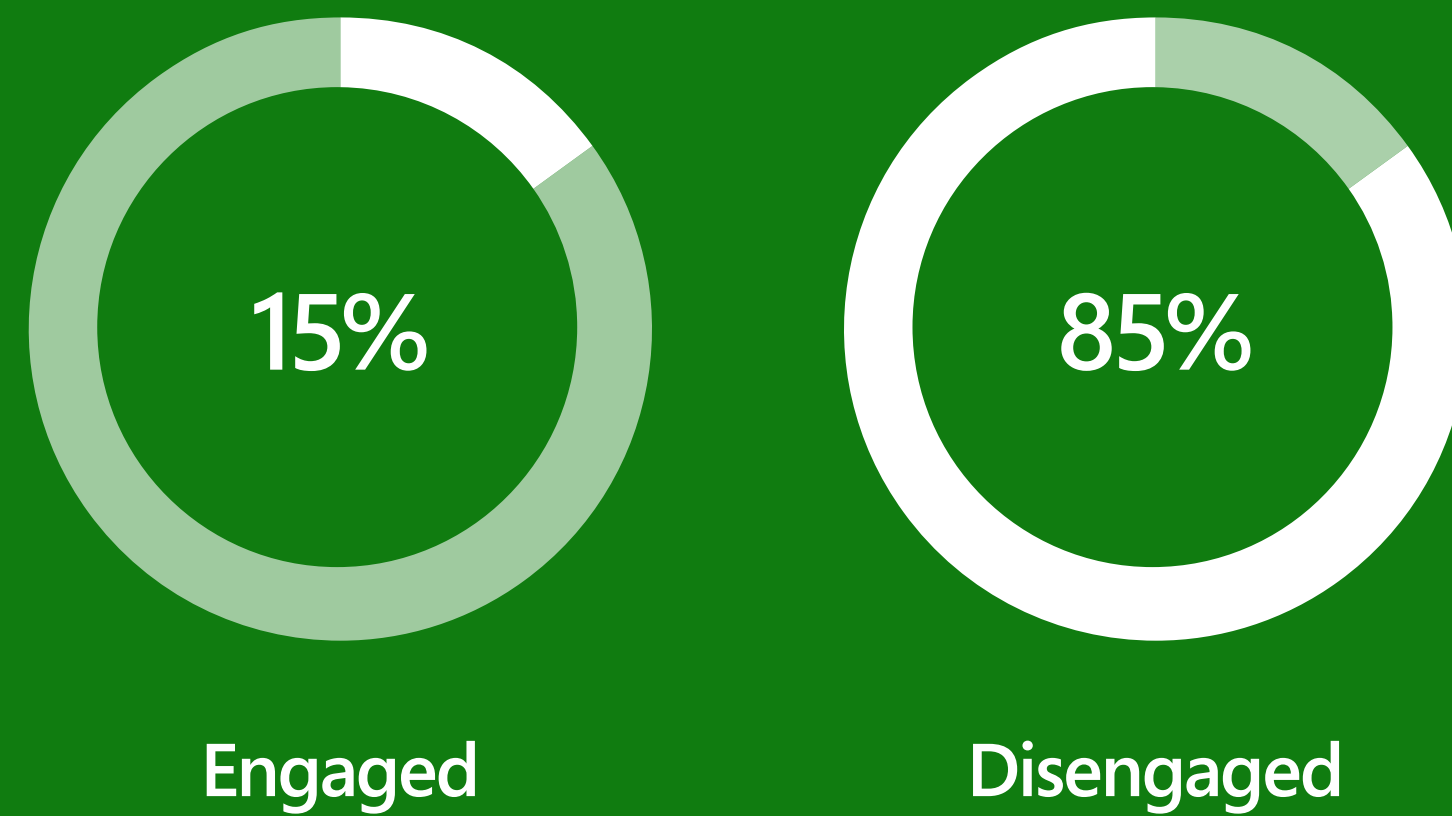
The line between authority and trust is a fine one, and a good project manager needs to facilitate a mix of both.

"You can't be an effective PM if you don't have authority," says Soto. "That means the authority to make decisions, authority within your team ... and authority with the business. This can be a real struggle sometimes."

So how do you establish authority in a way that inspires your team to do their best work? Provide the guidance and backup they



Employee engagement among full-time employees



SOURCE: State of the Global Workplace 2017, Gallup

need to succeed. Remember that you're the primary source of information and direction for everyone on the team, including stakeholders. Own that role. And when a risk arises, consult the team and encourage the appropriate action. "I won't let an issue lay out there in the wind," says Ruez. "I make sure something gets done."

"I see it as my responsibility to both help create the path for creative teams to move work forward and ensure clients feel heard, informed, and part of the process."

LAUREN CHILDS

Senior Producer,
at a global coffee retailer

Know when to step back and when to step in

Much of project management is walking the fine line between managing and micromanaging. Constant micromanagement distracts and delays your team—it stifles their motivation.

Keep your eye on the big picture and consider the context. "If you know that this is something that's urgent—time-sensitive, a key milestone for the project—then that needs to be micromanaged because it can't fail," says Ruez. "It can't miss or slip. If it's not, then you can let that person work on it without being in their ear constantly. It's about evaluating

the importance of the situation."

It's important to give your team the opportunity to stretch their skills and solve problems without your intervention. "We allow people to work on their own first and try to do it, but if they need help, all they have to do is ask," says Ruez. "We don't want to micromanage you. We want you to grow—find the problem, evaluate the problem, and fix the problem."

As you strike the right balance with your team, remember that a well-utilized project management tool can help you avoid some of the frequent communication typically associated with micromanagement. When you or another team leader needs to know the status of a deliverable, use the tool to get a detailed view of that information, leaving the team member free to focus.

Protect your team's productive energy

Keep an eye on the team's morale. Tight timelines and scope expansion, when not managed properly, can stall momentum. When you see the potential for burnout, balance the needs of the business with the needs of the people behind its success.

Collaborative teams look out for one another—especially at the project manager level. “As a PM, you are there to support the business but also protect and support your team. Constant communication and supportive solutions have worked for both sides in my work as a PM,” says Carrie Aker, a senior project manager for a top tier consulting company.

Create a culture of gratitude and camaraderie

Teams that celebrate and appreciate their members and achievements are often more productive. Boost your team's motivation by bringing a positive energy to your interactions and by taking time to thank them throughout projects.

Help coworkers strengthen their relationships and feel like more than a resource by including team building exercises in the project schedule. This can be as simple as taking 10 minutes in a meeting to ask people about their week-ends or having regular team lunches.

And, at a macro level, always celebrate the wins at the end of each project. Celebration naturally focuses on the positives and creates a shared sense of accomplishment that will serve the team well on future projects.



03

Foster collaboration between teammates

Project managers need to be skilled communicators.

- Set the standard for how the team communicates
- Stay in constant contact with key members
- Work through obstacles
- Resolve differences fairly and transparently

Project managers are often the central point of contact for their team, as well as a liaison between groups. Your communication skills will be on display daily and are crucial to facilitating great teamwork.

“As the project manager, I am the lead in making sure the team—within my institution and outside of it—is working together and communicating effectively to meet the goals of the project.”

TESS CALVERT

Portfolio Manager,
at a public research university

Model effective communication for the team

Project managers frequently set the standard for how the team communicates. A respectful, objective approach helps cement that tone throughout the process. Most people know what it's like to not feel heard, but it's harder to define what it takes to prevent that. Keep these tips in mind:

- Be an engaged listener
- Look out for nonverbal communication cues
- Don't get overwhelmed by stress
- Intercede in a respectful way
- Manage distractions

While technology makes it easier than ever to collaborate online, there's etiquette to consider. A conversation that starts as a quick instant message may be better resolved in person or on a video call if it's complex or emotional. Long-winded emails can make it harder for your team to quickly find the information they need. Communications typed in a hurry and sent without review can be misinterpreted or come across negatively. Remember that every conversation, in person or online, affects the caliber of teamwork.



“Strong relationships with the team and clients have always been the best way to foster communication.”

LAUREN CHILDS
Senior Producer,
at a global coffee retailer

Connect early and often to avoid setbacks

Even the best plans can get tangled when communication breaks down. A good project management tool can help by offering everyone on the team insight into the status of each task. Take advantage of this capability by keeping the tool up-to-date and making sure the team knows how to access information. This also helps mitigate issues that arise when team members don't always feel comfortable asking key questions—remember each team member has a distinct style of communication to cater to.

Be honest about your own deliverables. Showing that vulnerability can help the team feel more comfortable raising issues before they snowball, says Christine Yeager, a senior manager for a global beverage company. “If you've missed something, you can be open about it in the team setting, and it creates a sense of safety for the rest of the team to call out anything in a non-combative way.”

Ultimately, making sure everyone gets what they need to succeed comes down to having the right conversations at the right time—and approaching them collaboratively.

When setbacks happen, focus on moving forward

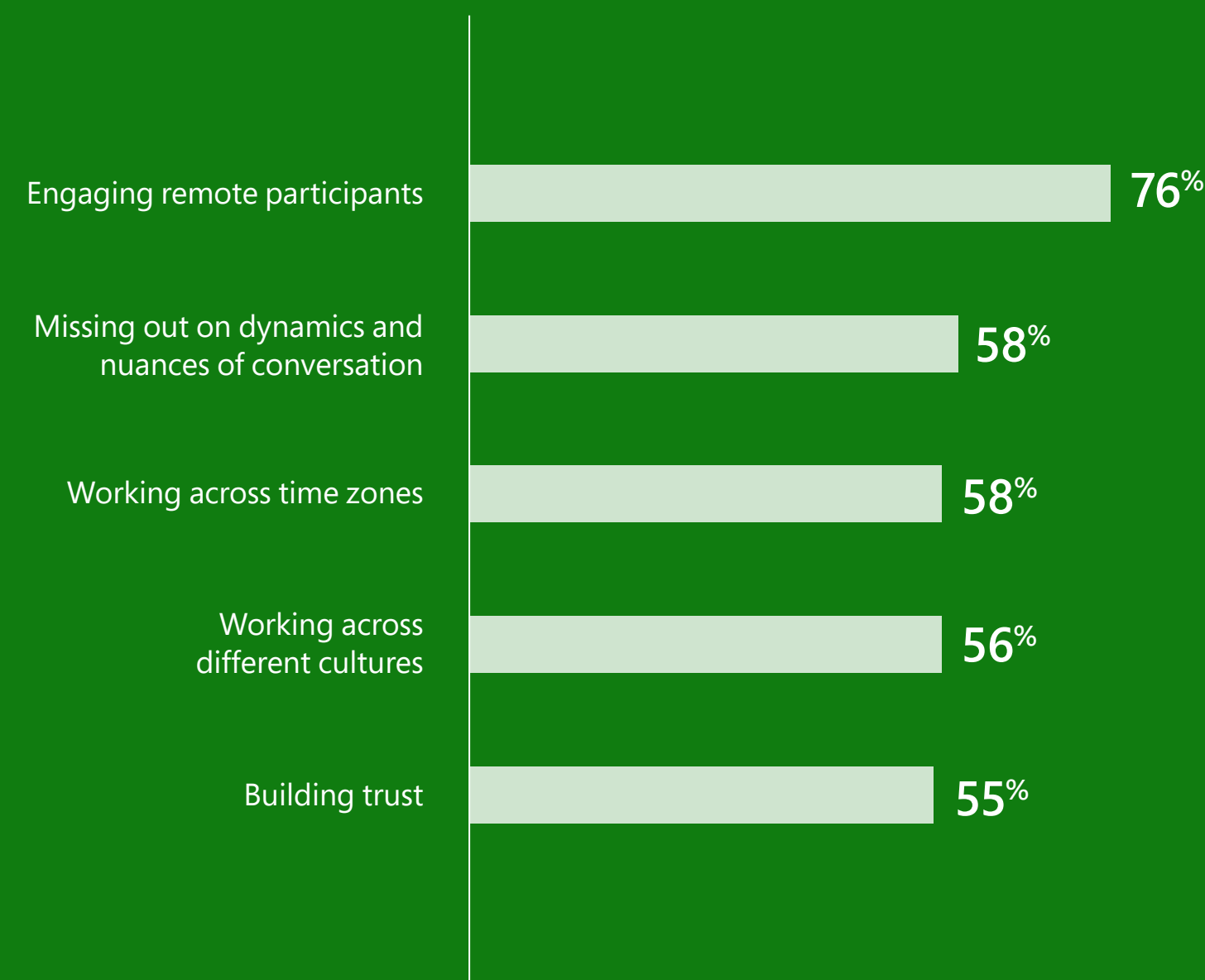
In an ideal scenario, everything goes according to plan, and the project's delivered on time and on budget. In reality, however, teams almost always hit obstacles. When that happens, avoid the temptation to dwell on what went wrong.

“It's a very easy trap to fall into—why did this happen? But I think as the PM, your goal is to get across the finish line, so you have to help the dialogue stay focused on progression. And then, maybe after the fact, you do a lessons-learned, and say, 'Ok, if we had done it differently, we wouldn't have had the problem.' But in the moment, you have to focus on what to do next.”

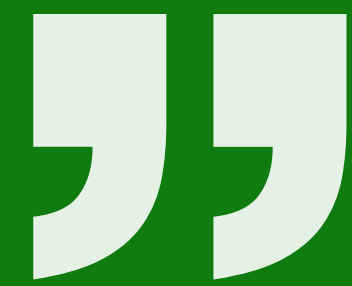
CHRISTINE YEAGER
Senior Manager,
at a global beverage company

A key role for any project manager is managing those obstacles. It can be stressful letting a stakeholder know the team's going to miss a deadline, but there is a productive, proactive way to approach the conversation. “You have to give the hard answer,” Ruez says. “You have to be able to tell them bad news. But if you tell them bad news with a possible solution, bad news is easier to swallow.”

Primary challenges of virtual working



SOURCE: Pullan, P. & Prokopi, E. (2016). Leading virtual project teams: dos and don'ts. Paper presented at PMI® Global Congress 2016—EMEA, Barcelona, Spain. Newtown Square, PA: Project Management Institute.



Working with a variety of people's personalities and workflows is the biggest challenge... so it is about finding the right communication mix, messaging, and just overall being a good team player."

KARLIE CHURCH

Digital Project Manager,
at a creative marketing agency

It can be tempting to act unilaterally in pursuit of a quick solution. Instead, set up a forum for transparent, engaged discussion with the team and develop a solution together. This approach nurtures the kind of collaboration that pays off down the line.

Resolve conflicts by managing differences

Not all teams naturally work well together. Different opinions, strong personalities, and unique perspectives can create disagreements that turn a highly functioning team environment into a toxic one. When conflicts arise, keep the team united.

"Prima donnas, passive-aggressive personalities, and staff who are unable to respect diverse viewpoints all can cause problems getting the work done. The only tactic I've found that has effectiveness is being calm, cool, and rational in my interactions with troublesome staff."

JOEL PLUTCHAK

Project Manager,
at a technology solutions program

Take steps to ensure that everyone is heard, and decide how the team will move forward together. "Listen to others. Let them finish their thoughts even if you disagree," says Claribel Cardenas, a senior project manager

for an interactive marketing agency. "Offer solutions—don't just bring up issues. Work together and compromise. Some battles aren't worth the struggle."

Sometimes battles aren't even what they seem. If a team member isn't buying in, Ruez says one of the first things to do is figure out why. "Is it lack of information? Do they not understand the programs in place for them to use? Is it a technical thing? Do they need training, then they realize it's not harder to do it that way—it's easier?" Once you get to the root of the issue, you can approach a solution together.

When all else fails, have an escalation plan in place. Some solutions can come from management or executive sponsors, but only when those administrators have insight into the issue at hand. "You've decided who those decision makers are. It's your job to facilitate getting the decision made and getting them to act on the risk you're seeing or getting them to steward the risk up to someone else to change their behavior," Yeager says.

Keeping any team united throughout a complex project takes patience and empathy. Finding middle ground in tense situations and moving forward from there isn't easy, but it can be learned. "I think that skill is based in emotional intelligence," Yeager says.

04

Mitigate risk through planning and communication

With a little preparation, you can be ready for common project obstacles.

- Hold your team accountable to processes
- Build communication across disciplines
- Document all key project stages

Project managers don't just manage the team dynamic. They also manage all of the moving pieces as they come together. This can be a monumental task, especially on large teams. With many contributors, it's crucial to ensure that everyone on the team is moving in the right direction. Without proper planning and constant communication, details can slip through the cracks. "Many projects fail because the PM did not anticipate or mitigate risks that create a less-than-ideal end result or bad experience," says Fernandez.

Team-oriented project managers are masters of process and timing, Cardenas says. "We can prevent failure by making sure the team knows and follows [the] process and can foresee and

offer options when obstacles arise. We raise flags when budgets are being misused and/or when a deadline can't be met."

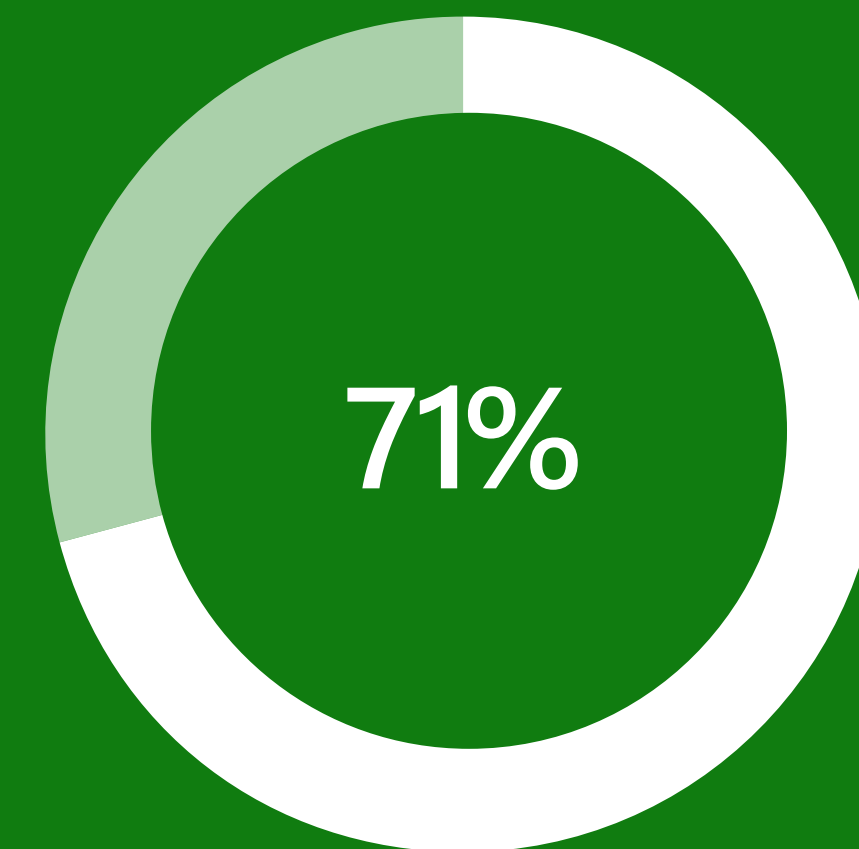
"Plan and think out extensively what you need, what you may need, and guess anything else so you have yourself well-covered as you begin. Take it one step at a time with lots of thoughtful communication to anyone you feel may need to know and then scale as you get clearer on what you need at each stage of the project."

CARRIE AKER

Senior Project Manager,
at a top tier consulting company

Encourage cross-functional communication

One way for project managers to catch potential issues early is to include key players from every discipline in regular meetings where they can raise concerns. "Having regular status reviews with a cross-functional team that may include the client is critical," says Fernandez.



of organizations now use
agile approaches to
their projects sometimes
or more frequently than
in the past.

SOURCE: Pulse of the Profession 2017, Project Management Institute

” Hire the right people and focus on the culture, the team, and the communication plan. Take time to figure out which project methodology might work best, and stay organized with work products that tell everyone their marching orders.”

TESS CALVERT

Portfolio Manager,
at a public research university

It's also important for that team to be present when decisions are made. “We share out work to stakeholders that cross multiple organizations, request feedback, and then schedule a meeting to review all of the feedback together and align on what is implemented before final release. It's a great venue for a discussion and has created trust among the team.”

Check in frequently

Cross-functional collaboration often happens during recurring meetings like scrums or other team syncs, which keeps the team engaged. But there are also ways to keep the team informed outside of meetings. “I love a status sheet,” Aker says. “A daily/weekly email status is great as well—especially with a project with a lot of parts happening on a quick/rotating timeline. I think folks hate too many random emails, and it's best to get all information in one spot on a regular basis.”

No matter how a project manager chooses to disseminate information and stay in touch with the team, maintaining a regular cadence when people know they'll have an opportunity to share updates is crucial.

Keep the schedule clear and accurate, and anticipate milestones

As your team approaches big moments in the project, ensure that the schedule they're following is easy to follow and has

enough detail to accurately show progress. “Depending on what program you use, it can be hard to understand the schedule or it may be too rudimentary and missing key steps. So having a real schedule is what helps in that,” says Ruez.

Maintaining a clearly defined rolling schedule helps Ruez and his team focus on what's next. “We lay everything out on three-week schedules, so we know what we're doing for the next three weeks and today to reach that goal,” Ruez says.

However you and your team stay on track, the project-management tool you use is extremely important to the process. Create a detailed timeline and manage resources according to an updated schedule to ensure everyone is on the same page and pulling accurate insights from a central source. This works well for Calvert, who sees how well her team responds to having easy access to their progress against that schedule. “We worked hard on our sprints to deliver core functionality that added value to the project. When the team continually sees the results of the work, it gives people some gratification to continue,” says Calvert.

05

Adopt tools that help your team work smarter

Choosing the right project management tool takes research and cross-discipline input.

- Clearly establish what you want to gain
- Evaluate which options work with existing systems
- Use tools to widely disseminate information

Given how much goes into facilitating highly functional teamwork and keeping everyone informed and aligned, it's important to find the right project management tool. A good tool can help collect data and communication in one place for easy access and also streamline and organize project efforts.

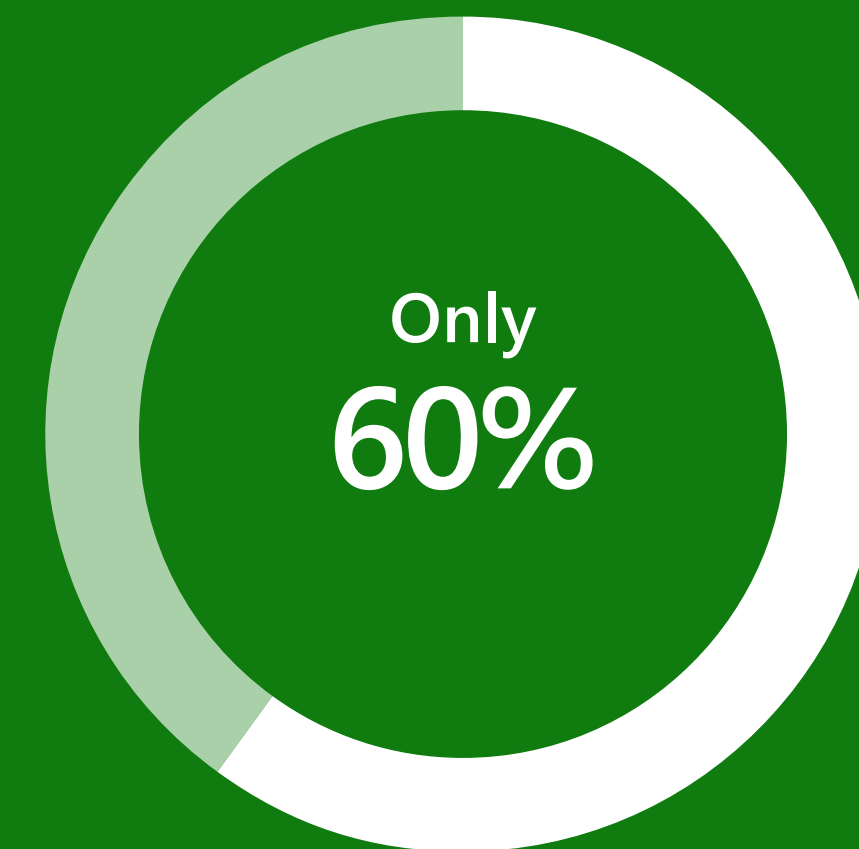
When the decision is made to introduce a new project management tool, it should be made with the people who will use it every day. Make them a part of the process, so that when it arrives they're prepared and excited to use it. "You have to be very careful before choos-

ing your tool," says Brett Harned, an independent digital project management consultant. "I always recommend a very careful approach where a team identifies requirements, assesses tools using free trials, and then presents findings to one another before selecting a tool for the whole team to test and onboard."

Find a flexible solution that works with what you already use

Successful adoption often hinges on how well the new project management tool fits in with the suite of products an organization uses every day. "Pick what's crucial for your team to do their work, and check it integrates with other tools doing other things for your business," says Elizabeth Harrin, an independent writer and business change manager.

Project Online, for example, fully integrates with Office 365, providing increased simplicity and efficiency that saves time and money. It's flexible and easy to use, avoiding the steep learning curve that can arrive with other solutions.



**of organizations say
they have ongoing training
for staff on the use of
project management tools
and techniques.**

SOURCE: Pulse of the Profession 2017, Project Management Institute

As global teams and a lack of schedule flexibility become increasingly common, physical and manual means of collaborating become less feasible. To keep distant teammates aligned on goals and moving forward together, it's helpful to roll out an online tool with built-in collaboration features. "We're about 400 people, with offices all over, and we've grown to where we're sharing work among offices and a design center. Having things that communicate are key for that," says Brandon Beville, a project manager at a civil engineering company.

With a tool like Project Online, your entire team can benefit from contextual communication and sharing among all members of the organization. According to Harned, the ability to share a plan by sending a link is helpful for teams and clients—and a game-changer for those working remotely. "Having access to your project-management system on the go can be really valuable when you're attending offsite meetings, need to check in on details while you're out, or handle any other 'remote' scenario that we face in today's workforce."

Most importantly, the right tool can protect a project's two most valuable resources—time and money—by harnessing the power of cross-team and cross-organization planning, management, and optimization. "It's easier to manage complex project schedules, and to accommodate changes in those, without having to reschedule everything manually or shift colored boxes around," says Harrin. "It

also provides a common language and a way of thinking about progress, which can be a useful and standard communication tool."

Provide action and insights for everyone

Offering everyone who's involved in a project—whether it's a business leader, portfolio manager, project manager, or individual contributor—a view into its status provides valuable insight and allows the project manager to focus on the big picture. "Using software removes a lot of administrative PM time from a team's plate," says Harned. "It's easier to track and update details, so a PM can invest their valuable time in the tasks that truly make or break a project's—communication facilitation, team and relationship building, risk assessment, and so on. If a team is striving to be more agile, the PM can use their time to work with a team to plan releases and facilitate the work. Tools help in documenting and tracking everything."

Project Online does just that—it provides your organization the most relevant capabilities and insights and allows your team to make data-driven decisions through advanced reporting and tracking systems. And because it's easy to get started quickly, teams will be on the same page from the beginning.





Next steps

The projects that move our world forward have become more complicated than ever. As a result, the role of a project manager has evolved into so much more than a mere task-master. Good project managers form the core element of collaborative, flexible teams that get things done. Great ones elevate their peers to new levels of productivity through a combination of communication, emotional intelligence, and well-utilized tools.

Be the leader your project needs. Your team's waiting for you.

Try Project Online today