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SOLUTIONS

LESSON 4

TEAM, CONFLICT, AND KNOWLEDGE

Instructor-Led Project Management Professional (PMP)® Exam Prep Course

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LESSON INTRODUCTION

In this lesson, we will explore the following tasks, as outlined in the **Project Management Professional (PMP)®** Certification Exam Content Outline :

- **Lead and structure the team** (ECO 1.3)
- **Manage conflict** (ECO 1.2)
- **Ensure knowledge transfer** (ECO 1.7)

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LESSON 4

LEADING AND STRUCTURING THE TEAM

PMP ECO 1.3

PMP®

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LESSON 4

ESTABLISHING CLEAR ROLES AND RESPONSIBILITIES

PMP ECO 1.3.7

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WHY ROLES AND RESPONSIBILITIES MATTER

- **Clarity** prevents confusion.
- **Collaboration** drives success.
- **Tailor roles** to fit context.

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OVERVIEW OF KEY PROJECT ROLES

Role	Description	Responsibilities
Project Manager	Leads the team	Coordinates tasks, manages scope
Project Sponsor	Provides strategic direction	Secures funding, resolves issues
Customer	Receives value	Provides feedback, approves work
Product Owner	Represents business	Prioritizes requirements
Project Team	Executes tasks	Designs, builds, tests deliverables

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THE PROJECT MANAGEMENT TEAM

The project management team:
Can be one or many individuals

Plans, mentors, and aligns
stakeholders

Adapts to uncertainty,
structure, and methodology

In adaptive environments
roles may be shared by Scrum Masters or coaches

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ROLE FLEXIBILITY AND TAILORING

How titles and responsibilities can vary:

- **"Project manager"** may be called "project lead."
- **Functional managers** may lead in matrix organizations.
- **Roles may share** project management functions.

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THE PROJECT SPONSOR, CUSTOMER, AND PRODUCT OWNER

Role	Influence	Key Support
Project Sponsor	High	Strategic direction, decisions
Customer	Medium	Expectation alignment, validation
Product Owner	Operational	Prioritizes needs, clarifies vision

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THE PROJECT TEAM

Definition

- The group that executes project work.

Considerations

- Size, skills, and coordination vary by project.
- May be centralized or self-organized (Scrum teams).
- Best practice: Match team structure to complexity and delivery approach.

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PROJECT MANAGEMENT TEAM COMPETENCIES

Social Responsibilities

- Leadership
- Communication
- Collaboration
- Ethical behavior
- Respect and inclusion

Getting Things Done

- Planning and organizing
- Delivering results
- Problem solving
- Adaptability
- Continuous improvement

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THE ROLE OF TECHNOLOGY IN ROLE EXECUTION

- **AI enables task tracking,** collaboration, and forecasting
- **AI supports risk and** schedule optimization
- **Cloud tools provide** global access
- **Help ensure ethical** and secure use

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DEVELOPING ROLE-BASED COMPETENCE

01 **Pair senior and junior** members.

02 Encourage **coaching and mentoring.**

03 Integrate **learning into daily tasks.**

04 Support **feedback and reflection.**

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BEST PRACTICES FOR DEFINING ROLES

CLEAR ROLE DEFINITION

01 Align with Project Goals
Ensure roles support objectives and value.

02 Define Clear Responsibilities
Avoid overlap and confusion.

03 Document Roles
Keep definitions visible and accessible.

04 Engage Stakeholders
Get input and agreement early.

05 Review and Adapt
Update roles as the project evolves.

06 Foster Accountability
Set expectations and measure outcomes.

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ESTABLISHING EXPECTATIONS AT THE TEAM LEVEL

PMP ECO 1.3.1

- **CLARIFY ROLES**
- **SET GOALS**
- **DEFINE DELIVERABLES**
- **ALIGN COMMUNICATION**

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CREATING SPACE FOR HYBRID TEAMS

- Create a team space that encourages **colocation, collaboration, communication, transparency,** and **visibility.**

COLOCATION
Work together when possible

COLLABORATION
Share ideas and expertise

COMMUNICATION
Keep everyone informed

TRANSPARENCY
Maintain visibility and openness

VISIBILITY
Make work, progress, and decisions visible

TRANSPARENCY

The practice of maintaining visibility and openness in communication, processes, and decision-making throughout the lifecycle of a project.

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UPHOLDING THE TEAM CHARTER AND GROUND RULES

CHECKLIST

- ☑ Are the rules visible?
- ☑ Do any rules need updating because of changing circumstances?
- ☑ Are new team members welcomed properly?

Has a ground rule been violated or broken?

- Help ensure the appropriate response.
- Remind team members about mutual agreement.
- Coach team members.
- Use servant leadership.
- Save harsh disciplinary action for severe violations.

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THE TEAM CHARTER AND GROUND RULES

- A team charter is a document **created together with the team** and can include:

- Shared values
- Behavior guidelines
- Guidelines for communications and use of tools
- Decision-making guidelines
- Performance expectations
- Conflict-resolution measures
- Meeting time, frequency, and channel
- Other team agreements

TEAM CHARTER

A document that records the team values, agreements, and operating guidelines as well as establishes clear expectations regarding acceptable behavior by project team members.

GROUND RULES

Expectations regarding acceptable behavior by project team members.

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DISPLAYING TASK ACCOUNTABILITY

- **Keep work and progress visible to demonstrate transparency of work completed.** Work breakdown structure (WBS) dictionaries and work package descriptions document tasks and the assignee. RACI (responsible, accountable, consulted, informed) matrices display roles and responsibilties. Encourage team members to **self-organize continuously** in determining accountability standards.

EXAMPLE TASKS (KANBAN)

- [x] Invite people to my kanban board.
- [x] Change user settings.
- [x] Create mockup kanban board.
- [x] Make a real kanban board.
- [x] Put new items on my kanban board.
- [x] Check out latest updates.
- [x] Web page needs updating.
- [x] *kanban board mockup

WBS
Documents tasks and the assignee.

RACI
Displays roles **and responsibilities.**

SELF-ORGANIZE
Encourage continuous improvement in accountability standards.

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CREATING A COLLABORATIVE TEAM CULTURE

PROJECT MANAGER

- The **project manager** builds team agreements, structures, and processes that support a culture that enables individuals to work together and benefit from interactions.
- The project manager tailors a resource management plan.

TEAM

- **The team** assembles and self-organizes to support project requirements.
- **The team** uses team agreements and a team charter.

(Optional) How do you think a collaborative team culture can be created in a hybrid approach? Give some examples!

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TUCKMAN'S STAGES OF GROUP DEVELOPMENT

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TUCKMAN STAGES OF TEAM DEVELOPMENT

1 FORMING

- Team members meet and begin to trust one another.

2 STORMING

- Team members begin to assert themselves and take control of emerging issues.

3 NORMING

- The team begins to work productively, without worrying about personal acceptance or control issues.

4 PERFORMING

- The team is working at optimum productivity and is collaborating easily, communicating freely, and solving its own conflicts.

5 ADJOURNING

- Team members complete their assigned work and shift to the next project or assigned task.

Tuckman, B. W., & Jensen, M. A. C. (1977). Stages of small-group development revisited. *Group & Organization Studies*, 2(4), 419–427..

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PROJECT TEAM FORMATION: KEY CONCEPTS

SELF-ORGANIZING TEAM

- A cross-functional team in which people fluidly assume leadership as needed to achieve the team's objectives.

SERVANT LEADERSHIP

- The practice of leading the team by focusing on understanding and addressing the needs and development of team members to enable the highest possible team performance.

These concepts can be applied in **any kind of project team.**

CROSS-FUNCTIONAL TEAM

A team that includes practitioners with all the skills necessary to deliver valuable product increments.

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ESTABLISHING EXPECTATIONS

Before setting team-level expectations, help ensure the **team understands:**

01 The overall project objectives

02 The why behind the project

03 How their work contributes to business value

04 Success criteria

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IMPORTANCE OF ESTABLISHING EXPECTATIONS

When expectations are **communicated clearly** and **reinforced consistently**:

Team members understand their roles. → **Accountability grows.** → **Collaboration strengthens.**

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ESTABLISHING EXPECTATIONS

01 **Define** roles and responsibilities.

02 **Set** performance and behavior expectations.

03 **Model** the behavior you expect.

04 **Align** on tools, processes, and communication norms.

05 **Communicate** how progress will be tracked.

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FOCUSING ON TEAM STRENGTHS

- Organize around **team strengths**.
- Be aware of **weaknesses**.
- Identify **threats** to team success and **opportunities to improve team performance**.

SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis

S STRENGTHS

- What does the team do well?
- What unique skills and expertise exist?
- What gives the team an advantage?

W WEAKNESSES

- What are the gaps in skills or resources?
- What challenges does the team face?
- Where can the team improve?

O OPPORTUNITIES

- What external trends can the team leverage?
- What new tools, technologies, or skills can help?
- What possibilities exist to improve performance?

T THREATS

- What external risks could impact success?
- What obstacles might the team face?
- What could limit team performance?

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TEAM NORMS

Together, establish **expected team behaviors** at the beginning of the project. Enable teams to **handle challenges later**. Include guidelines and techniques for:

- **Meetings**
- **Communications**
- **Conflict management**
- **Shared values**
- **Decision-making**
- Align team values with the PMI Code of Ethics and Professional Conduct

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TEAM ROLES AND RESPONSIBILITIES: REVIEW EXERCISE

In this hybrid project, the _____ oversees project management plan integration, but delegates control of detailed product planning and delivery to the _____.
The _____ focuses on building a cross-functional team and a collaborative decision-making environment. They help ensure the team can respond to changes. The process role of _____ helps the team to understand the mindset and use scrum processes.
To develop the SLC product, the _____ is the local domain expert that plans how to do the work, and the _____ looks after value creation.

Project Manager

Product Owner

Scrum Master / Coach

Team

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USING REWARDS AND RECOGNITION

REWARDS

- **Tangible, physical** items
- For a **specific outcome** or **achievement**
- Use to **motivate** toward a specific outcome.
- **Never reward without recognition!**

RECOGNITION

- **Intangible, experiential** event
- Acknowledge the **person's behavior** rather than an outcome.
- Use to increase the recipient's **feeling of appreciation.**
- Can be given **without a reward.**

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DETERMINING AN APPROPRIATE LEADERSHIP STYLE

PMP ECO 1.3.6

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POWER SKILLS

Project professionals use interpersonal power skills, including **collaborative leadership**, **communication**, an **innovative mindset**, **for-purpose orientation**, **and empathy**. Teams with these skills can maintain influence with a variety of stakeholders—a critical component for making change.

- Collaborative Leadership
- Communication
- Innovative Mindset
- For-Purpose Orientation
- Empathy

LEADERSHIP ≠ MANAGEMENT

LEADERSHIP

- Guiding the team by using **discussion** and **an exchange of ideas**.

MANAGEMENT

- Directing actions using a **prescribed set of behaviors**.

- Adapt leadership style to **situations** and **stakeholders**.
- Be aware of **individual and team aims** and working **relationships**.
- Use **political awareness** and **emotional intelligence**.

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SERVANT LEADERSHIP

SERVANT LEADERSHIP

The practice of leading the team by focusing on **understanding and addressing the needs and development of team members** in order to enable the highest possible team performance.

Facilitate rather than manage.

Provide coaching and training.

Remove work impediments.

Focus on accomplishments.

Encourage every team member to be a servant leader.

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THE PROJECT MANAGER'S ROLE IN ADAPTIVE TEAMS

Leadership and management models:

CENTRALIZED

All team members practice leadership activities, and **accountability is usually assigned to one individual** such as the project manager or similar role (team lead).

DISTRIBUTED

One project team member (may shift) **serves as facilitator** to enable communication, collaboration, and engagement on accountable tasks.

If a team is **self-organizing**, is a **project manager needed**? If not, **which of these models works best**? If yes, what does that role look like?

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HYBRID TEAM FORMATION: EXAMPLE

Centralized coordination by a project manager or team lead and **self-organized project teams** for portions of the work.

Project Manager / Team Lead

- Centralized coordination
- Overall accountability
- Alignment with business goals

Coordinates and Enables

- Sets direction and priorities
- Provides support
- Removes impediments
- Monitors progress

Team A

Feature Development

- Self-organized team
- Delivers specific features/ components

Team B

Product Enhancement

- Self-organized team
- Works on defined work packages

Team C

Testing & Deployment

- Self-organized team
- Focuses on testing, deployment or operations

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EMPOWERING THE TEAM

PMP ECO 1.3.2

GIVE AUTONOMY

Provide the team with decision-making authority within agreed boundaries.

PROVIDE RESOURCES

Ensure access to the information, tools, and support needed to succeed.

BUILD TRUST

Show confidence in the team's capabilities and expertise.

ENCOURAGE COLLABORATION

Foster open communication, idea sharing, and mutual respect.

SUPPORT DEVELOPMENT

Offer coaching, mentoring, and opportunities for growth.

RECOGNIZE CONTRIBUTIONS

Celebrate achievements and acknowledge team efforts.

An empowered team is more engaged, innovative, and better equipped to deliver value.

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UNDERSTANDING YOUR TEAM'S NEEDS

Skill and Experience

- An inexperienced team may need **more guidance and structure.**
- An expert team is likely to perform better with **autonomy and trust.**

Motivation

- Use emotional intelligence to read your **team's mood, stress levels, and motivation.**
- Low morale may require a **transformational or coaching style.**

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EMPOWERMENT, UNITY, AND AUTONOMY

EMPOWERMENT

Empower teams to feel a sense of **ownership of work, make decisions collaboratively**, and share responsibility.

UNITY

Prioritize **team unity** over individual contributions.

AUTONOMY

Grant **autonomy** to teams to show trust, inspire, and boost productivity.

GOAL

The team recognizes their **power and influence.** As an empowered, cohesive unit, team members depend on one another to make decisions and solve problems to **deliver desired value quickly.**

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VIRTUAL TEAM MEMBER ENGAGEMENT

Manage engagement by focusing on:

- **Team Dynamics**
- **Transparency**
- **Accountability**

EFFECTIVE COMMUNICATION
Pay attention to effective communication.

VIDEOCONFERENCING TOOLS
Use and adapt videoconferencing tools.

ACTIVE PARTICIPATION
Check for active participation; assess body language and tone.

VISIBILITY OF WORK AND WORK STATUS
Enable visibility of work and work status with tools (e.g., kanban-style boards).

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VIRTUAL TEAM GOOD PRACTICES

COMBAT ISOLATION

Manage the risk of feeling isolated.

FOCUS ON SHARED GOALS

Emphasize shared commitments and team goals.

BUILD COMMITMENT

Instill a sense of shared commitment.

COMMUNICATE REGULARLY

Keep open, clear, and consistent communication.

USE COLLABORATION TOOLS

Leverage videoconferencing, chat, and project management tools.

KEY TAKEAWAY

Focus on **shared commitments** and **team goals** versus individual accomplishments to keep your **virtual team engaged.**

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WHERE AND HOW THE TEAM WORKS

COLOCATION
IF POSSIBLE, IS BEST!

- Colocction, if possible, is best!

ENVIRONMENT AND LOCATION

- Consider environment and location when assessing team performance.

MEANINGFUL INTERACTION

- Foster meaningful interaction to support autonomy.

WORKING HOURS AND PRACTICES

- Respect agreed-on team working hours and practices (ground rules).

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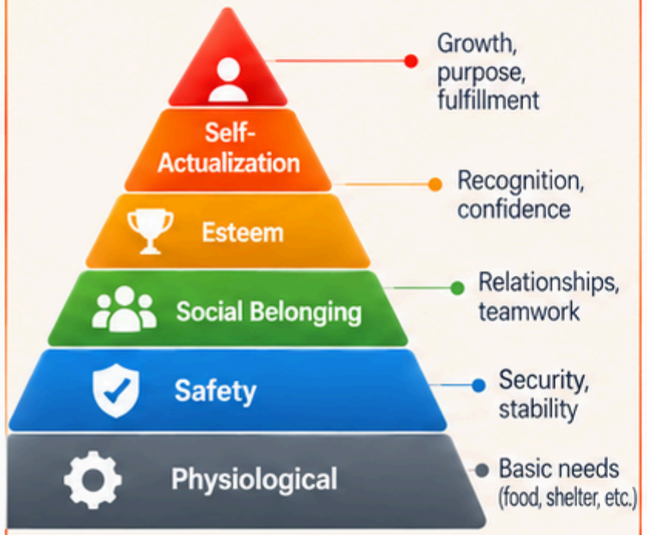
MOTIVATIONAL THEORIES AND APPROACHES

01 Maslow's Hierarchy of Needs



02 Herzberg's Motivation-Hygiene Theory

Hygiene Factors (prevent dissatisfaction)	Motivators (increase satisfaction)
• Company policy • Supervision • Working conditions • Salary • Job security • Interpersonal relationships	• Achievement • Recognition • Meaningful work • Responsibility • Advancement • Personal growth
Remove Dissatisfaction	Drive Motivation

03 McGregor's Theory X and Theory Y

Theory X	Theory Y
• People dislike work • Avoid responsibility • Need close supervision • Motivated by fear and control	• People enjoy work • Seek responsibility • Are self-motivated • Can be creative and innovative • Motivated by trust and empowerment
Control-Oriented	Empowerment-Oriented

04 McClelland's Achievement Motivation Theory

Need for Achievement (nAch)	Desire to achieve challenging goals.
Need for Affiliation (nAff)	Desire for positive relationships and belonging.
Need for Power (nPow)	Desire to influence, lead, and make an impact.

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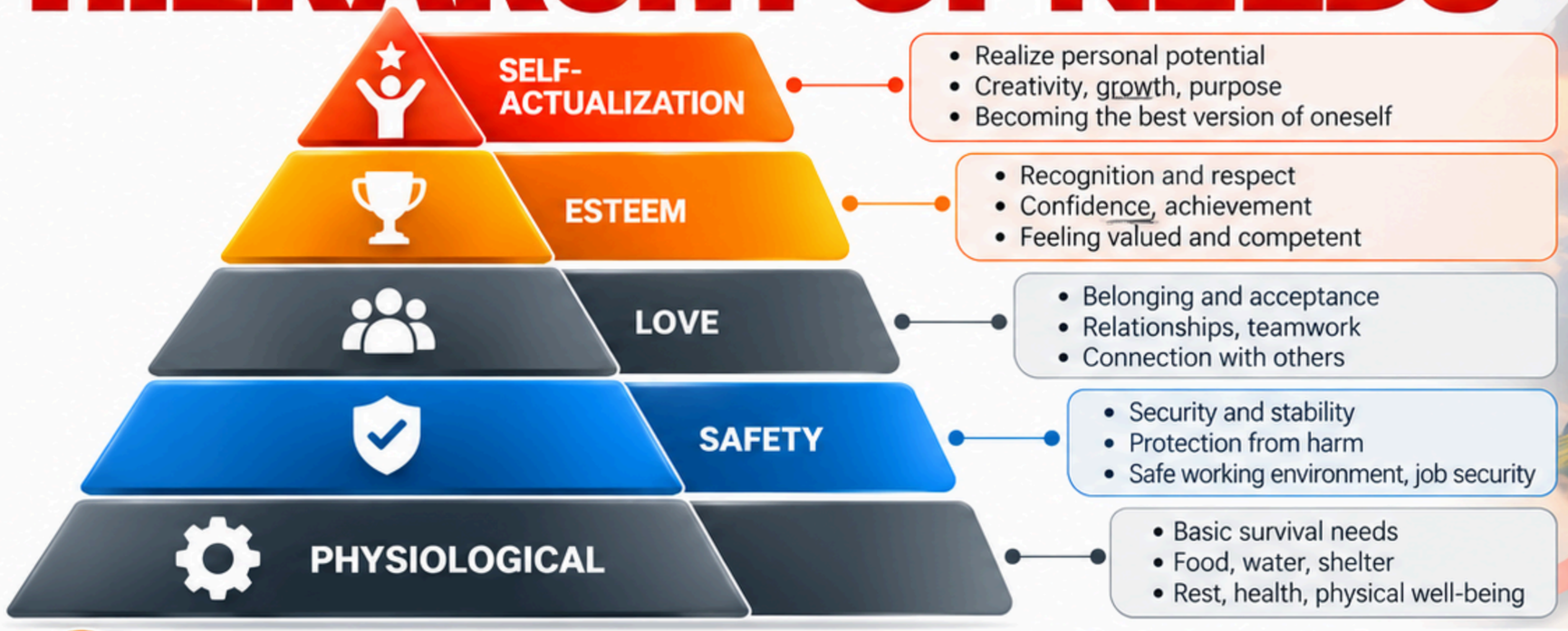
MASLOW'S HIERARCHY OF NEEDS



- **SELF-ACTUALIZATION**
  - Realize personal potential
  - Creativity, growth, purpose
  - Becoming the best version of oneself
- **ESTEEM**
  - Recognition and respect
  - Confidence, achievement
  - Feeling valued and competent
- **LOVE**
  - Belonging and acceptance
  - Relationships, teamwork
  - Connection with others
- **SAFETY**
  - Security and stability
  - Protection from harm
  - Safe working environment, job security
- **PHYSIOLOGICAL**
  - Basic survival needs
  - Food, water, shelter
  - Rest, health, physical well-being

REFERENCE

Maslow, A. H. (1943). A theory of human motivation. *Psychological Review*, 50(4), 370–396.

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HERZBERG'S MOTIVATION-HYGIENE THEORY

ALSO KNOWN AS TWO-FACTOR THEORY

HYGIENE FACTORS
Prevent Dissatisfaction
(Extrinsic Factors)

- Company policy and administration
- Supervision
- Working conditions
- Salary and benefits
- Interpersonal relationships
- Job security
- Status

If hygiene factors are inadequate, people become **dissatisfied.**

They do not necessarily increase motivation when present, but their absence causes dissatisfaction.

MOTIVATORS
Increase Satisfaction
(Intrinsic Factors)

- Achievement
- Recognition
- Meaningful work
- Responsibility
- Advancement
- Personal growth

Motivators lead to higher **satisfaction,** engagement, and performance.

Their presence increases motivation and drives individuals to achieve more.

REFERENCE

Herzberg, F., Mausner, B., & Snyderman, B. B. (1959). *The motivation to work* (2nd ed.). John Wiley & Sons.

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McGREGOR'S THEORY X AND THEORY Y

THEORY X (AUTHORITARIAN)

- Workers dislike and avoid work.
- People avoid increased responsibility.
- People need to be directed.

THEORY Y (PARTICIPATIVE)

- People want to be active.
- Workers seek job satisfaction.
- They do not require direction.

Theory X managers are often called "old-fashioned," but can you think of a modern context in which this management style is helpful?

REFERENCE

McGregor, D. (1960). *The human side of enterprise*. McGraw-Hill.

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McCLELLAND'S ACHIEVEMENT MOTIVATION THEORY

ACHIEVEMENT
Need for Accomplishment (nAch)

- Desire to achieve challenging goals
- Prefer moderate risk
- Seek personal accomplishment
- Look for feedback on performance

POWER
Need for Influence (nPow)

- Desire to influence and make an impact
- Enjoy leadership opportunities
- Seek control and authority
- Want to shape the environment

AFFILIATION
Need for Belonging (nAff)

- Desire for close relationships
- Value teamwork and collaboration
- Seek acceptance and harmony
- Enjoy working with others

An individual's needs are shaped by life experiences in three areas; one becomes dominant:

- Use this information to influence goal setting, feedback, and motivation/reward systems.
- Design or craft roles based on team member strengths.
- Identify the need for balance to create T-shaped people and high-performing project teams.

REFERENCE

McClelland, D. C. (1961). *The achieving society.* D. Van Nostrand Company.

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EMOTIONAL INTELLIGENCE DOMAINS

WITH SELF
Personal Competence

RECOGNIZE
Self-awareness

- Understand your emotions
- Recognize strengths and weaknesses
- Be aware of your values and triggers

REGULATE
Self-management

- Manage your emotions
- Stay calm under pressure
- Adapt to change
- Show self-discipline and positive mindset

WITH OTHERS
Social Competence

RECOGNIZE
Social awareness

- Understand others' emotions
- Empathize with different perspectives
- Recognize social cues
- Appreciate diversity and build trust

REGULATE
Relationship management

- Communicate effectively
- Inspire and influence
- Build and maintain positive relationships
- Resolve conflicts and collaborate

REFERENCE

Goleman, D. (1995). *Emotional intelligence: Why it can matter more than IQ. Bantam Books.*

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MOVING THROUGH THESE DOMAINS

WITH SELF
Personal Competence

RECOGNIZE
Self-awareness

- Understand your emotions
- Recognize strengths and weaknesses
- Be aware of your values and triggers

REGULATE
Self-management

- Manage your emotions
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- Adapt to change
- Show self-discipline and positive mindset

WITH OTHERS
Social Competence

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EMOTIONAL INTELLIGENCE COMPETENCIES

SELF AWARENESS

Understand your own emotions and their impact

- Emotional self-awareness

SELF MANAGEMENT

Regulate your emotions and behavior

- Emotional self-control
- Adaptability
- Achievement orientation
- Positive outlook

SOCIAL AWARENESS

Understand others and the social environment

- Empathy
- Organizational awareness

RELATIONSHIP MANAGEMENT

Build and maintain effective relationships

- Influence
- Coach and mentor
- Conflict management
- Teamwork
- Inspirational leadership

REFERENCE

Goleman, D. (1995). *Emotional intelligence: Why it can matter more than IQ.* Bantam Books.

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EMPATHY

THE FOUNDATION

- Provides a foundation for understanding the motivations of other people

EMPATHY

- **Understanding**, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experience of another.

EMPATHETIC TRAITS

That make individuals more able to contribute to collaborative, high-performing teams:

INWARD (helps individuals)

- Understanding others
- Service orientation

EMPATHY

- Understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experience of another.

Goleman, D. (1995). Emotional intelligence: Why it can matter more than IQ. Bantam Books.

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SOCIAL SKILLS

High-performing team members are adept at:

- Communicating
- Building bonds
- Collaborating and cooperating

- Catalyzing change
- Managing conflict
- Influencing
- Leading

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MOTIVATIONAL ELEMENTS

01 ACHIEVEMENT/ DRIVE

- Set tough goals, take chances.
- Strive for success.
- Discover how to upskill.
- Minimize uncertainty.

02 COMMITMENT

- Make decisions based on team core principles.
- Realize benefits of holistic participation.
- Sacrifice to fulfill company goals.
- Search for opportunities to achieve team mission.

03 INITIATIVE

- Work hard toward goals.
- Inspire others through extraordinary accomplishments.
- Seize opportunities.

04 OPTIMISM

- Hope to succeed; don't fear failure.
- Perceive reversals as under your control.
- Work toward goals regardless of barriers.

REFERENCE

Goleman, D. (1995). *Emotional intelligence: Why it can matter more than IQ.* Bantam Books.

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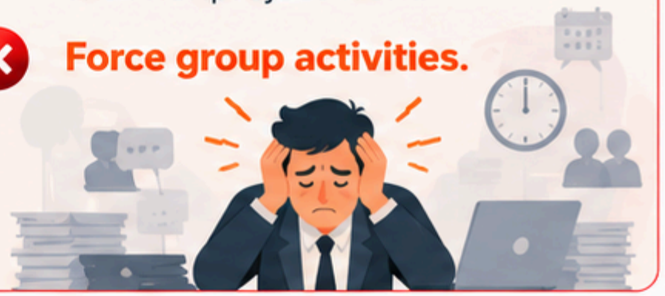
LEARNING THE RIGHT WAYS TO MOTIVATE YOUR TEAM

DO

- **Inspire and motivate yourself** and the team—provide opportunities, not obligations.
- **Give virtual teams constant** and regular contact.
- **Provide appropriate training** opportunities.
- **Try self-assessment and reflective moments** for professional growth.

DON'T

- **Overwhelm teams** with meetings and work interruptions.
- **Distract team members** with nonproject work.
- **Force group activities.**



REFERENCE

Goleman, D. (1995). *Emotional intelligence: Why it can matter more than IQ*. Bantam Books.

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REPRESENTING THE TEAM'S VOICE

PMP ECO 1.3.4

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PROJECT TEAM LEADERSHIP OBJECTIVES

Communicate (and recommunicate) project objectives. Help ensure fluid knowledge sharing and a continued healthy team dynamic; this includes welcoming new members and realigning the team. Focus the team on **delivering value.**

- Communicate and recommunicate project objectives
- Ensure fluid knowledge sharing
- Maintain a healthy team dynamic
- Welcome new members
- Realign the team as needed
- Focus the team on delivering value

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LESSON 4

THE PROJECT MANAGER'S ROLE IN A CENTRALIZED MODEL

01 Measures and monitors progress and takes appropriate action.

02 Collects, analyzes, and communicates project information to relevant stakeholders.

03 Helps ensure completion of all project work and formally closes each phase, contract, and the project as a whole.

04 Manages phase transitions when necessary.

05 Helps ensure alignment of due dates—project deliverables, project life cycle, and benefits realization plan.

06 Provides a project management plan.

07 Helps ensure creation and use of appropriate knowledge to and from the project.

08 Manages project performance and changes to project activities.

09 Makes integrated decisions about key changes that impact the project.

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LESSON 4

SUPPORTING DIVERSITY AND INCLUSION

PMP ECO 1.3.5

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LESSON 4

SUPPORTING BALANCE

Empower teams as a cohesive unit, but respect individuals.
Team balance development objectives might include:

01 Improving team knowledge and skills to **reduce cost and time** and **improve quality**.

02 Improving trust to **raise team morale**, **reduce conflict**, and **improve teamwork**.

03 Creating a **collaborative culture** to improve individual and team performance and facilitate cross-training and mentoring.

04 Empowering the team to **participate in decision-making** and own the solutions they create.

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LESSON 4

CREATING PSYCHOLOGICAL SAFETY AND EMBRACING BALANCE

Psychological safety is a psychosocial condition required for high-performing project teams. Team members should be comfortable being themselves at work. Healthy work settings:

- Embrace uniqueness.
- Built on trust and mutual respect.
- Help ensure ethical decision-making.

PSYCHOLOGICAL SAFETY

Being able to show and employ oneself without fear of negative consequences to status, career, or self-worth—we should be **comfortable being ourselves in our work setting.**

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LESSON 4

STANDARDS FOR CREATING A BALANCED, FAIR, AND TRUSTING TEAM

Teams are **global** and **vary in culture, gender, physical ability, language,** and many other factors.

The project environment **optimizes the team's different skills and abilities** and builds a climate of **mutual trust.**

FAIRNESS | TRUST | INCLUSION | LEVERAGE DIVERSE SKILLS | BETTER PERFORMANCE

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LESSON 4

COLOCATED, VIRTUAL, AND HYBRID TEAMS

VIRTUAL TEAM

- Becoming normal in most workplaces
- Better skills at lower costs
- Avoids relocation expenses
- Better work-life balance
- Relies on communication technology
- May have bonding challenges

COLOCATED TEAM

- Interaction is easy.
- Better bonding is facilitated.
- Use of physical tools and notice and bulletin boards is possible.

VIRTUAL TEAM

Project team members who fulfill their roles with **little or no time spent meeting face-to-face.**

COLOCATED TEAM

Project team members are located physically close to one another **to improve communication, working relationships, and productivity.**

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LESSON 4

VIRTUAL TEAM CHALLENGES

- **Individual** performance tracking
- **Diversity**—language, technological skill
- **Solo working** prohibits bonding

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LESSON 4

RUNNING VIRTUAL TEAMS

Check in with people individually as often as possible.

Conduct positive **network-building** activities.

What are your tips for creating a positive virtual team experience?

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LESSON 4

VIRTUAL TEAM COMMUNICATION TECHNOLOGY

Plan team communication and collaboration methods. Consider working hours, geographical dispersion, and security requirements. **Use appropriate tools:**

- Task boards
- Messaging and chat programs
- Calendars
- Document storage
- Knowledge repositories
- Videoconferencing

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LESSON 04

ADDRESSING VIRTUAL TEAM MEMBER NEEDS

Facilitate and help ensure collaboration as a priority.
Address the basic needs of a virtual team, including:

Cohesion

Build a sense of belonging and trust within the virtual team.

Shared Goals

Align everyone towards common objectives.

Clear Purpose

Ensure everyone understands the team's purpose and contribution.

Clarity on Roles and Expectations

Define roles clearly and set expectations to avoid confusion.

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LESSON 04

USING PERSONALITY RESEARCH TO COACH TEAM MEMBERS

Personality can affect:

- What role you have within the team
- How you interact with the rest of the team
- Whether your values (core beliefs) align with those of the team

Psychological Team Roles:

Results Oriented

Focus on achieving goals and delivering outcomes.

Relationship Focused

Build strong relationships and support team members.

Innovative and Disruptive Thinkers

Bring new ideas and challenge the status quo.

Process and Rule Followers

Ensure structure, consistency and compliance.

Pragmatic

Practical, solutions focused and results driven.

Discussion (Optional):

Using this list of psychological team roles, which types of project tasks or process roles would you associate them with?

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LESSON 04

SOLVING PROBLEMS

PMP ECO 1.3.3

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LESSON 04

DECISION-MAKING: EMPOWERING THE TEAM TO ACT

The **team charter** identifies **decision-making** and **conflict resolution criteria.** Teams establish their own norms or way of working for making decisions and conflict resolution. **Teams always try to achieve consensus.**

Decision-Making Criteria

Defined in the team charter.

Team Norms

Teams establish their own way of working.

Conflict Resolution

Use agreed criteria and team norms.

Seek Consensus

Teams always try to achieve consensus.

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LESSON 04

DECISION-MAKING: OPPORTUNITIES TO EMPOWER THE TEAM

Activities

- Clarify and prioritize requirements or user stories.
- Split requirements into tasks.
- Estimate effort.
- Risks Classification.
- Response.

Discussion (Optional):

Can you think of other challenges that can be addressed by team decision-making?

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LESSON 04

DECISION-MAKING METHODS

VOTING

- **Consensus driven,** based on data.
- **Collective decision-making** and assessment.
- Determines several alternatives, with future actions as the expected outcome.
- Use to **generate, classify, and prioritize product requirements.**

MULTICRITERIA DECISION ANALYSIS

- **Data driven.**
- **Method —** Establishes criteria in decision matrix; e.g., risk levels, uncertainty, and valuation.
- Uses a **systematic, analytical approach.**
- **Evaluates and ranks** many ideas.

AUTOCRATIC DECISION-MAKING

- **Leadership driven,** based on data.
- **One team member** decides for the group.

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LESSON 04

DECISION-MAKING METHODS: VOTING

UNANIMITY

- Everyone agrees on a single course of action; useful in project teams with great cohesion.
- **Example:** Delphi technique.

MAJORITY

- Decision reached with **> 50%** of group support.
- Create groups of an **uneven number of participants** to help ensure decisions are made and **avoid tie votes/draws**!

PLURALITY

- Decision reached with **largest block** in a group deciding, even if majority is not achieved.
- Use this method when **more than two options** are nominated.

Voting methods to reach consensus

- **Fist of Five**
- **Planning poker**
- **Dot voting**
- **Roman voting (thumbs)**
- **Polling**

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LESSON 04

PMP®

MANAGING CONFLICT

PMP ECO 1.2

AT-PMTECH SOLUTIONS

LESSON 04

IDENTIFYING CONFLICT SOURCES ANALYZING CONFLICT CONTEXT

PMP ECOs 1.2.1 and 1.2.2

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LESSON 04

CAUSES OF CONFLICT: CONTEXT

COMPETITION

Differences in objectives, values, and perceptions—these can be ideological.

DISAGREEMENTS

About role requirements, work activities, and individual approaches.

COMMUNICATION BREAKDOWN

Communication breakdowns.

PROJECTS ARE UNIQUE

Projects are unique and team members have not worked together before.

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LESSON 04

CONFLICT AS A PART OF TEAM CULTURE

In a psychologically safe work environment:

- View disruption and innovation as **connected.**
- Encourage exchanges and **disagreement.**
- Prevent escalation to **conflict.**

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LESSON 04

USING LEAS' LEVELS OF CONFLICT

- Conflict intensifies from level 1 to 5. A conflict can evolve from a task orientation with possible resolutions to an intractable solutions that is nearly impossible to resolve.
- Leas, S. B. (1983). *Leadership* and conflict. Abingdon Press.

CONFLICT INTENSIFIES

1 TASK ORIENTATION

Differences in ideas, opinions, or approaches to the work.

2 EMOTIONAL REACTIONS

Increased tension and emotional responses.

3 BEHAVIORAL ESCALATION

Defensive behaviors, reduced collaboration.

4 LOSS OF PRODUCTIVITY

Focus shifts from solving the problem to winning.

5 INTRACTABLE CONFLICT

Breakdown in relationships and nearly impossible to resolve.

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LESSON 04

IMPLEMENTING AN AGREED-ON RESOLUTION STRATEGY

PMP ECO 1.2.3

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LESSON 04

HANDLING CONFLICT

01 **Use preferred ways of managing conflict** from the team charter and ground rules. Provide guidance and resources to help the team.

02 **Adaptive teams include conflict** management strategies in their way of working and are supported by a culture of trust.

03 **Focus on the issues** and not on the individuals.

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LESSON 04

WHY CONFLICT MANAGEMENT MATTERS

Ineffective conflict management leads to:

- Destructive behavior
- Animosity
- Poor performance
- Reduced productivity

Effective conflict management leads to:

- Improved understanding
- Better performance
- Higher productivity

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LESSON 04

COMMUNICATING CONFLICT MANAGEMENT PRINCIPLES WITH THE TEAM AND EXTERNAL STAKEHOLDERS

PMP ECO 1.2.4

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LESSON 04

COMMUNICATING CONFLICT MANAGEMENT PRINCIPLES

01 Promote a shared understanding of conflict

02 Establish ground rules early

03 Explain common conflict management styles

04 Support conflict resolution with tools and routines

05 Engage external stakeholders effectively

06 Reinforce the principles throughout the project

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LESSON 04

USING INTERPERSONAL SKILLS TO MANAGE CONFLICT

01 Emotional Intelligence
Use empathy to understand and diffuse situations.

02 Influencing
Persuade parties to reconsider or change their tone, approach, or mindset.

03 Leadership
Steer others in a more positive direction.

04 Decision-Making
Offer a solution to move the situation forward.

05 Active Listening
Listen for personalized, accusing language and bitter or caustic tone; watch for defensive or aggressive physical postures.

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LESSON 04

CONFLICT MANAGEMENT APPROACHES

01 Smooth / Accommodate

- Emphasize areas of agreement.
- Concede position to maintain harmony and relationships.

02 Withdraw / Avoid

- Retreat from the situation.
- Postpone the issue.

03 Compromise / Reconcile

- Incorporate a range of viewpoints.
- Enable cooperative attitudes/open dialogue to bring some degree of satisfactions.

04 Force / Direct

- Pursue your viewpoint at the expense of others.
- Offer only win-lose solutions.

05 Collaborate / Problem-Solve

- Incorporate several viewpoints and insights from varying perspectives.
- Requires cooperative attitude and open dialogue.
- Search for solutions that typically lead to consensus and commitment.

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LESSON 04

PMP®

ENSURE KNOWLEDGE TRANSFER

PMP ECO 1.7

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LESSON 04

IDENTIFYING CRITICAL PROJECT KNOWLEDGE

PMP ECO 1.7.1

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LESSON 04

INTRODUCTION TO KNOWLEDGE MANAGEMENT

Knowledge is an essential asset of any organization.
The individual, team, and organizational knowledge allow the organization to do what it does. Knowledge can be :

- **Project-specific information**
- **Outcomes of projects**
- **New trainings**

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LESSON 04

KNOWLEDGE TYPES

Explicit knowledge

- Information that can be readily codified using words, pictures, or numbers.

Tacit knowledge

- Information that cannot easily be codified.

LESSON 04

FOSTERING A KNOWLEDGE-SHARING CULTURE

Training, coaching, and mentoring are all forms of knowledge sharing that advance projects and organizations. Team members learn from and teach others. A knowledge-sharing culture is for everyone, including stakeholders, team members, and customers as part of project work and continuous improvement efforts. Some project roles are dedicated to knowledge sharing—e.g., coaches or scrum masters. A knowledge-sharing culture is essential in product delivery and transition planning!

COACH

An individual with knowledge and experience in who can train, mentor, and guide organizations and teams through their transformation.

TRAINING

MENTORING

KNOWLEDGE SHARING

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LESSON 04

PROJECT MANAGER ROLES

Roles of project managers in knowledge management:

- Maintain team and transfer knowledge.
- Identify different knowledge transfer approaches.

MAINTAIN TEAM and transfer knowledge.

IDENTIFY DIFFERENT knowledge transfer approaches.

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LESSON 04

GATHERING KNOWLEDGE

PMP ECO 1.7.2

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LESSON 04

GATHERING KNOWLEDGE

Gathering knowledge in a project involves systematically collecting, analyzing, and sharing information crucial to achieving project goals. This process helps ensure informed decision-making, enhances efficiency, and mitigates risks.

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LESSON 04

THREE LEVELS OF KNOWLEDGE MANAGEMENT

INDIVIDUAL

- What do team members need to know to perform project work?
- Encourage and support employees to acquire required knowledge through training and collaboration.

PROJECT

- What is required to achieve the project goals?
- Provide retrospectives and lessons learned from current and other projects such as organizational process assets.

ORGANIZATION

- What is required to manage programs or portfolios?
- Adapt knowledge from other programs or portfolios and incorporate proven practices.

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LESSON 04

FOSTERING AN ENVIRONMENT FOR KNOWLEDGE TRANSFER

PMP ECO 1.7.3

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LESSON 04

Document explicit knowledge for archival and sharing. Encourage individuals to share tacit knowledge and collaborate. Treat knowledge as an asset to the team and organization.

Curating Knowledge as an Asset

DOCUMENT EXPLICIT KNOWLEDGE

Capture and store information for archival and sharing.

ENCOURAGE SHARING & COLLABORATION

Support individuals to share tacit knowledge and collaborate.

TREAT KNOWLEDGE AS AN ASSET

Leverage knowledge to strengthen the team and organization.

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LESSON 04

INCORPORATING KNOWLEDGE TRANSFER OPPORTUNITIES

- **NETWORKING**
- **SPECIAL INTEREST GROUPS**
  e.g., communities of practice
- **MEETINGS, SEMINARS, OR OTHER EVENTS**
  in-person and virtual events
- **TRAINING**
- **JOB SHADOWING**

COMMUNITY OF PRACTICE

A group of individuals who share a common interest and learn by engaging in shared activities, exchanging knowledge, and developing a shared collection of practices and resources.

JOB SHADOWING

A direct observation method where one individual observes another performing their jobs, tasks, or processes within their work environment.

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LESSON 04

KNOWLEDGE TRANSFER

01 Lessons learned register

02 Networking

03 Communities of practice

04 Meetings, seminars, and other in-person events

05 Training

06 Job shadowing

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LESSON 04

KNOWLEDGE MANAGEMENT DURING CLOSING

CONDUCT RETROSPECTIVES OR LESSONS LEARNED MEETINGS

ARCHIVE ALL PROJECT INFORMATION

FINALIZE THE LESSONS LEARNED REGISTER

ADD TO KNOWLEDGE MANAGEMENT REPOSITORY

TRANSITION KNOWLEDGE FROM PROJECT TEAM TO THE CUSTOMER

LESSONS LEARNED REGISTER

A project document or repository used to record knowledge gained during a project, phase, or iteration so that it can be used to improve future performance for the team and organization.

LESSONS LEARNED REPOSITORY

A central store of historical lessons learned information from various projects across jurisdictions.

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LESSON 04

CONDUCTING A PROJECT RETROSPECTIVE

INTERNALIZE LEARNING
About the work product and process.

CAPTURE KEY SUCCESSES AND CHALLENGES

CONSIDER QUALITATIVE AND QUANTITATIVE DATA
(people's feelings and measurements).

USE DATA TO FIND ROOT CAUSES
Design counter-measures and develop action plans for next time.

PRAISE, CONGRATULATE, AND MOTIVATE THE TEAM!

An **adaptive team** might conduct a final retrospective, whereas a project manager holds a final team-wide meeting for **the** team in a predictive life cycle. These are similar ceremonies for closing a project or phase.

A project retrospective helps **capture** valuable insights to improve future performance, strengthen team collaboration, and enhance organizational knowledge management.

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LESSON 04

FINALIZING LESSONS LEARNED

Include the following topics from the project's lessons learned register in the final report:

- SCOPE CHANGES
- SCHEDULE IMPACTS
- RISKS AND ISSUES
- STAKEHOLDER RELATIONSHIPS
- VENDOR RELATIONSHIPS
- ARTIFACTS
- RECOMMENDATIONS

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LESSON 04

CONSOLIDATING LESSONS LEARNED

The following categories of lessons learned information are **especially important** at the end of a project:

- SCHEDULING
- CONFLICT MANAGEMENT
- CUSTOMERS AND VENDORS
- STRATEGIC
- TACTICAL
- TRANSFER

Transfer these into the **lessons learned repository.**

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LESSON 04

RESULTS SUMMARY FINAL REPORT

DESCRIPTION	Describe activity undertaken, including deliverables or milestones.
SCOPE OBJECTIVES	Document scope evaluation criteria and give evidence of met completion criteria.
QUALITY OBJECTIVES	Describe evaluation criteria for project and product quality. Verify objectives are met; give actual milestone delivery dates and reasons for any variances.
COST OBJECTIVES	Restate acceptable cost range; give actual costs and reasons for any variances.
VALIDATION INFORMATION	Include required approvals for final product, service, or result—e.g., user satisfaction survey results.
SCHEDULE OBJECTIVES	Verify project objectives were completed on time; report on any variance and effects of the variance.
BENEFITS REALIZATION	State how the final product, service, or result achieved the business needs and expected benefits; if partial, give details of variance and fulfillment schedule.
RISKS OR ISSUES ENCOUNTERED	List risks and issues and state how they were addressed.

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LESSON 04

END OF LESSON 4