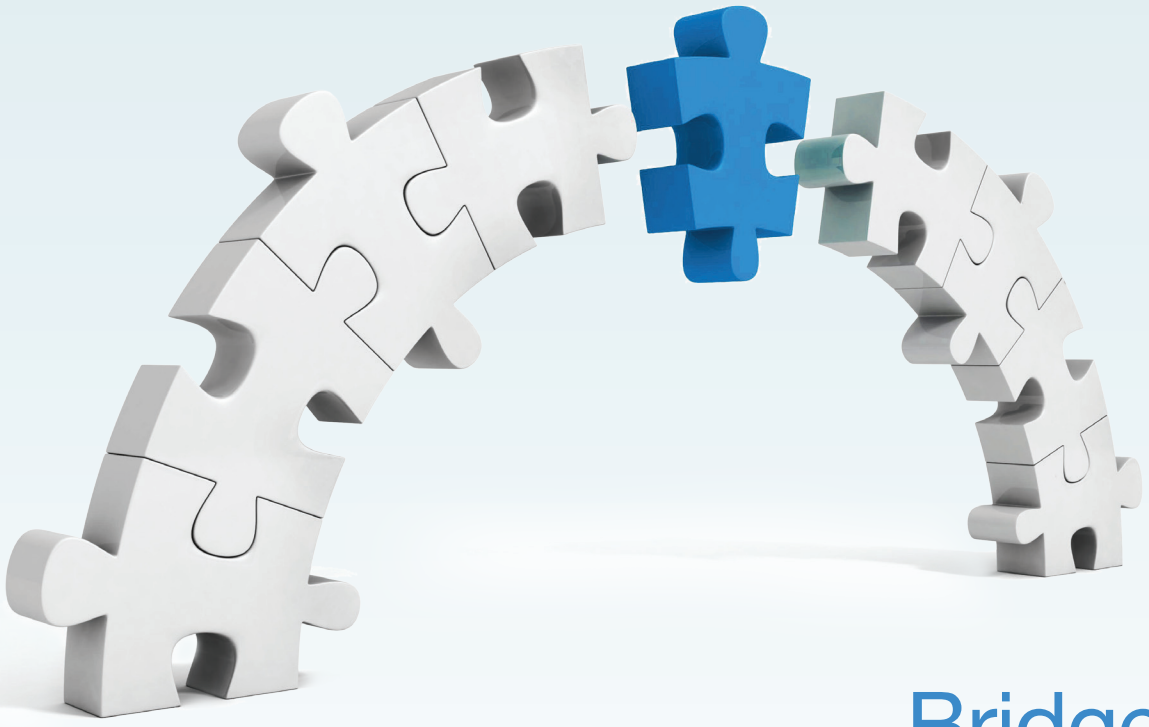

Bridge to **Project Management**

AWES
ALBERTA WORKFORCE ESSENTIAL SKILLS

Funding provided by: ***Immigrant Settlement and Language Programs*** *– Jobs, Skills, Training and Labour*

Bridge to Project Management

August 2016

This resource is part of blended learning project and includes on-line materials. This course is designed to help ESL employees gain project management skills through a focus on language, intercultural and Workplace Essentials Skills.

Acknowledgements

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Project manager: Sue Oguchi

Project team: Linda Lindsay, Aundrea Novakoski, Emil Tarka

For more information contact:

Cindy Messaros, Executive Director

Alberta Workforce Essential Skills Society (AWES)

www.awes.ca

AWES

ALBERTA WORKFORCE ESSENTIAL SKILLS

The Alberta Workforce Essential Skills Society (AWES) is a training and research and development organization. Our mission is to meet the changing needs of industry and society by developing skilled Albertans.

Bridge to Project Management

Course overview

This course helps ESL employees gain project management skills through a focus on language, intercultural and Workplace Essentials Skills. The course consists of four online learning modules and four full-day workshops. Participants will explore project management concepts that can be applied to any job by moving through the phases of a project.

Module 1: Project Fundamentals and Initiation

This workshop builds an understanding of basic project parts. It begins to look at the cultural aspects of power while developing strategies to engage in workplace meetings more effectively.

Module 2: Planning the Project

This workshop continues to explore the elements of project management specifically looking at the planning phase. It explores the cultural influences related to motivation and develops strategies for speaking up at work.

Module 3: Project Execution

This workshop begins to look at the typical problems encountered while managing projects. It includes approaches to resolving conflict and ways to ensure better understanding through improved communication strategies.

Module 4: Monitoring and Project Closure

This workshop outlines the completion of the project cycle and looks at workplace relationships and perspectives. It continues to build communication skills with a focus on improving how you present information to a group. The workshop includes looking at the final reporting required to complete a project.

Target audience

ESL employees interested in improving their language, intercultural and Essential Skills related to project management. This course is for those who are leading a project, part of a project team or hoping to gain more responsibility in the workplace.

Learning goals

- Learn about the many pieces of a project and begin to understand how to manage them
- Explore the differences in workplace culture for newcomers
- Participate more effectively in meetings
- Communicate more clearly and effectively with team members
- Solve and prevent problems more effectively
- Write more clearly, concisely and coherently

To access the online training materials contact info@awes.ca

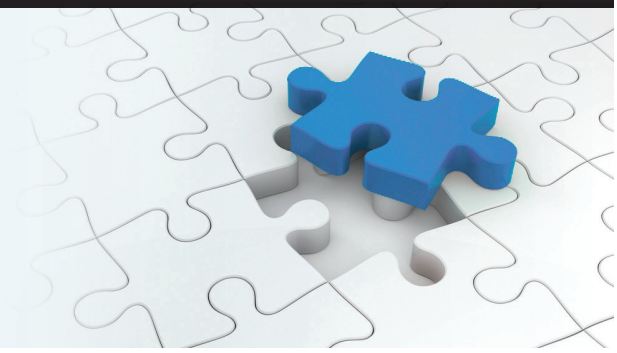
In-Class Module 1

Project Fundamentals and Initiation

In-Class Module 1: Project Fundamentals and Initiation

Contents

Project management **content knowledge**



Outcomes

- Understand what project management does for a company
- Gain appreciation for the job of the project manager
- Gain skill in developing a stakeholder register
- Explore power difference in the workplace
- Learn effective workplace communication for meetings
- Develop memo writing skills

Making connections

Thinking about what you learned online and answer the following questions.

1. In your own words, answer the question: What is a project?
2. Does the information fit what you already knew or is it different?

A project is a temporary and unique endeavor undertaken to create a product, service or result.

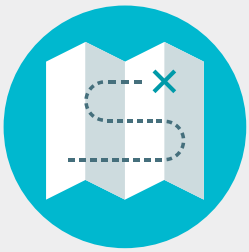
PMBOK Guide 5th Ed., A Guide to the Project Management Body of Knowledge

An individual or collaborative enterprise (project worked on by two or more groups) that is carefully planned and designed to achieve a particular aim.

Oxford Dictionary

A project is a problem scheduled to be solved.

Dr. I. M. Juram



Task: Project or operations

Determine whether the examples given below are projects or operations. Be ready to discuss your decision and your reasons.

The northern division of an international manufacturing company
A golf tournament hosted by the local YMCA to raise money for their programs
Development of a new Android app
A small accounting firm located in northern Alberta
A custom home designed for a specific customer
A carpenter hired to frame an addition on an existing structure
A bookkeeper that provides the same service to a customer each month
A carwash fundraiser for your child's swim team
The Cadillac product line for General Motors
Designing the ductwork for a new office building

Topic: Why project management?

Focus question

Briefly think about the following question before you start to read:

- **What are the benefits of project management?**

Benefits of project management[1]

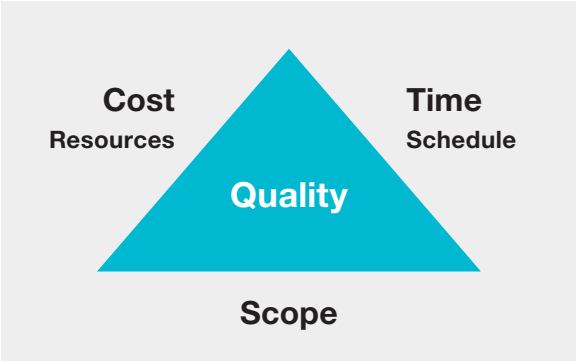
1. **Better efficiency in delivering services** – Project management provides a roadmap (a plan) for getting things done. It helps employees to look ahead and see potential problems that can be avoided. Once your team is trained to see issues and avoid them before they happen, you will all be working smarter and not harder and longer.
2. **Improved customer satisfaction** – Whenever you get a project done on time and under budget, the customer walks away happy. And a happy customer is one you'll see again.
3. **More effective service delivery** – The same strategies that allowed you to successfully complete one project will help you in other projects.
4. **Improved growth and development within your team** – Positive results command respect and inspire your team to continue to look for ways to perform more **efficiently** (maximum productivity with minimum resources).
5. **Greater standing and competitive edge** – You'll be known as trustworthy and hardworking. This is a benefit of project management within the workplace and outside of it. Word travels fast (people talk about who is successful in projects) and there is nothing like superior performance to let others know you are not likely to fail in the marketplace.
6. **Opportunities to expand your services** – Great performance leads to more opportunities to succeed (more people will want to hire you, work with you, and benefit from your skills).
7. **Better flexibility** – Project management allows you to plan how you will complete your project. If you discover a smarter direction to take, you can. Many small-to-midsize companies indicate that better flexibility and increased adaptability is the biggest benefit their business receives from project management.
8. **Increased risk assessment –** When the project team has been assembled, and your **strategy** is in place, potential **risks** (situations involving exposure to danger or loss) will stand out. Project management helps you to notice red flags before it's too late.
9. **Increase in quality** – Goes hand-in-hand with **enhanced** effectiveness.

[1] Kerzner, Harold, "Project Management – A Systems Approach to Planning, Scheduling and Controlling", Eleventh Edition, Wiley, New Jersey, 2013.

10. **Increase in quantity** – An increase in quantity is often the result of better efficiency, a simple reminder regarding the benefits of project management.
11. **A training ground for managers** – Project managers begin with small sized projects so they can develop their own management style and improve their project management skills. A survey by consulting giant McKinsey & Co. found that nearly 60 percent of senior executives said that building a strong project management **discipline** (an area of knowledge) is a top priority for their companies as they look into the future. Many companies are looking to project management as a way to stay ahead of the competition by controlling spending and improving project and overall company results. By involving employees in project management, the employees get used to willingly accepting and supporting change.

Topic: Trade-offs

As a project moves forward, the project manager and the members of the project team face **trade-offs** (compromises, or the exchange of one thing for another). Trade-offs happen because projects have limited resources.



Any time a team member or the project manager makes a choice, they must look at the positive and negative aspects of the options at hand. In many cases, the decision maker does not have all of the information that they require to make the perfect decision. The diagram illustrates the project **triple constraint** (the balance of cost, time and scope in a project). This diagram shows that a project manager must first fully comprehend the scope, schedule and cost of the project. Once these factors have been identified, the project manager must balance and manage them. Mismanagement of these factors may lead to a decrease in the quality of the product or service which the project aims to achieve. This is what the industry refers to as balancing the triple constraint.

Examples of trade-offs

- The purchasing member of your team has found two suppliers for component XR2400-233. A long-time supplier of the company can fill your order for 100 units of the component but not for one month. A supplier that you never used can fill the order this week but it will cost $76 more per unit.

- You have found that the component you need is out of stock and won't be in for a week, but there is another part in stock that will work and can be shipped immediately. The replacement part is less expensive because it is made of a less durable material.
- You are creating the project team and the maintenance person that you feel is the most qualified to be a member of your team is extremely busy. She is on several other projects. You spoke to her and she said she will give you as much input as she can but her time is limited and she won't be able to make it to any meetings. She did, however, recommend another member of the maintenance group that she feels will be able to help you out.

Topic: What are the roles of the project manager?

The person who is responsible for the project as a whole is the project manager.

The key roles of the project manager are outlined below. Every role is important to ensure the success of the project.

Key roles of the project manager[2]

Role	Description	Example
 Visionary	Someone who can see into the future, understand what can be, and describe it to others in a convincing manner	
 Team builder	A cheerleader, coach, counsellor, and teammate who is skilled at helping individuals succeed for the good of the whole	
 Planner	Someone who can identify needed resources and tasks, then schedule activities	

[2] Adapted from Black, Ron, "The Complete Idiot's Guide to Project Management with Microsoft Project 2000" (QUE, Indianapolis, IN, 2000).

 Estimator	Someone who can **forecast** (predict) with accuracy the time and money needed for a project	
 Meeting facilitator	The person in charge of keeping all people and personalities cooperative, productive and respected	
 Manager	Administrator of organizational policies, procedures and controls	
 Problem solver	A person who is able to see what everyone else sees and come up with a solution	

Task: Discuss project manager roles

Work with a partner to give examples of each of the project manager roles. These examples can be based on your experiences or on what you have seen project managers do. When you and your partner are finished, ask other pairs what their answers are.

Topic: Project charter

Many organizations use the project **charter** to formalize the project. The project charter is a high-level document created by the project manager and signed by the project **sponsor**. The charter authorizes the creation of the project and gives the project manager the authority to start spending organizational funds on project planning activities. The purpose of this document is to outline high-level project objectives, requirements, risks, milestones and to assign responsibility and authority to the project manager. Below is an explanation of the elements of the project charter.

Project Charter

Project name:

Project manager's name:

Date:

Project purpose: In this section the project manager explains why the organization is undertaking the project. Understanding the purpose of the project allows the project manager and the project sponsor to align their understanding of the project's purpose.

Project objectives: Objectives are high-level goals which the project aims to achieve upon its completion. The success of the project is measured by the project manager's ability to fulfil the project objectives. Objectives must be SMART: (S) specific, (M) measurable, (A) achievable, (R) realistic and (T) time bound.

High-level risks: In this section the project manager outlines the risks which he and his team foresee affecting the success of the project. At this stage little analysis is done on these risks as they will be further analyzed in the planning process group.

Project constraints: Constraints are factors that limit the range of project activities in the execution process group. Most commonly identified project constraints are: scope, schedule, budget, weather and availability of resources.

Project assumptions: Assumptions are what we know to be true about a project at a given point in time. At this stage of the project management lifecycle we only focus on what we currently know the range of the project work to be. Project managers identify assumptions in order to gain consensus with the project sponsor of the project's scope of work while the charter is being developed.

Milestone schedule: A milestone is an event in time. While the milestone schedule is not a detailed schedule, it allows the project manager to map out key events in the project's lifecycle. In the planning process group, the milestone schedule will be used as an input into the development of the final project schedule.

Project manager's responsibility and authority: Responsibility is the range of activities for which the project manager will be responsible for in the remaining process groups. Authority is the power which is given to the project manager to fulfill his range of work. Most common examples of authority include: spending thresholds, ability to hire and fire project staff, and authority to make changes to the scope of the project.

Signature: This section of the charter identifies the fact that the project sponsor has read and agrees to the components of the project charter. It is a good idea for both the project manager as well as the project sponsor to sign the charter. Once the project charter has been signed, the project manager may begin spending organizational resources on project planning activities.

Topic: What are Essential Skills?

Focus questions

Briefly think about the following questions before you start to read:

- **What skills do all people need at work, no matter what their job is?**
- **What work-related skills would I like to improve?**

The Nine Essential Skills

The Employment and Social Development Canada (ESDC) website defines the nine Essential Skills as the "skills needed for work, learning and life". They were identified through extensive research done by the Government of Canada and national and international agencies in the 1980s and 1990s. These nine Essential Skills are used in all occupations, at different levels of complexity.

In the workplace, these nine Essential Skills are the foundational skills needed for learning all other skills. They enable Canadians to **evolve** (develop gradually over time) with their jobs and adapt to changes at work. The nine Essential Skills are as follows:

1. Reading
2. Document Use
3. Writing
4. Numeracy
5. Oral Communication
6. Thinking
7. Digital Technology
8. Working With Others
9. Continuous Learning

Each role that the project manager plays uses different Essential Skills. It is important to know where you are strong and where you might need to improve your skills.

Why are Essential Skills important?

Having strong Workplace Essential Skills (WES) is like being a tree with a strong root system: it gives protection in difficult times and enables growth. People with strong WES are able to:

- Learn new skills more easily
- Transfer that learning from one context to another with less effort

People with strong WES are less affected by change in the workforce. WES levels have a direct effect on a person's **employability** (able to be employed) and future career **mobility** (the movement of employees across positions or to other companies or occupations). Strong thinking skills strengthen the other eight skills.

But it's more than that! Workplace Essential Skills are tied to workplace improvements, with research that backs up the following findings.

What are the benefits of a team with strong Essential Skills?

The project manager needs strong Workplace Essential Skills (WES). Project team members also must have strong WES. The nature of a project is that lots of work needs to be done in limited time with limited resources, so the team has to be efficient and effective. Strong WES help to accomplish this goal with the least amount of stress, errors and waste. Most of you have probably used some of the same skills that are used when managing a project.

The following benefits are given as a result of strong Workplace Essential Skills in the workplace.

Increased productivity

- Less time per task
- Reduced error rates
- Less waste

Enhanced workplace efficiencies

- Capacity to understand job requirements and procedures
- Ability to work independently
- Ability to apply new knowledge and skills on the job

Increased competitiveness

- Capacity to understand job requirements and procedures
- Meeting quality standards
- Improved customer service leading to customer **loyalty** (previous customers will continue to buy from or use products made by a company)

More vibrant and engaged workforce

- Sense of ownership of work
- Improved self-esteem, self-confidence and **morale** (the spirit of a group that makes the members want the group to succeed)
- Opportunities for career development and promotion
- Better workplace health and safety
- Capacity to understand safety instructions
- Ability to remember and apply information from training sessions

Better team performance

- Ability to understand personal contribution to organizational goals
- Better communication between workers and management
- Ability to work effectively as a team

More highly skilled workforce

- Ability to communicate and use technologies with confidence
- Ability to keep pace with changes in the workplace

Task: Discussion related to project management and Workplace Essential Skills

1. In your opinion, which of the project manager roles is most important? Explain why.
2. Which of the project manager roles do you feel you would be good at? Which role would best suit your skills?
3. Fill in the following table[3] relating to you and your Workplace Essential Skills. Rank your ability in each of the WES. (1 = very weak, 10 = very strong)

Workplace Essential Skill (WES)		Skill level (1 to 10)	Example of when you used this skill
	**Reading** – understanding reading materials written in sentences or paragraphs. We use this skill to scan for information, skim overall meaning, evaluate what we read and combine information from different sources.		
	**Document Use** – finding, understanding or entering information in various types of documents. We use this skill when we read and interpret signs, maps, lists, graphs, charts and enter information in forms.		
	**Writing** – communicating by arranging words, numbers and symbols on paper or a computer screen. We use this skill when we organize, record, document, provide information to persuade and request information from others.		

[3] Adapted from Employment and Social Development Canada, www.esdc.gc.ca

	**Numeracy** – using numbers to complete tasks. We use this skill to estimate, work with money, analyze numerical trends and to create schedules and budgets.		
	**Oral Communication** – using speech to exchange thoughts and information. We use this skill to greet people, take messages, reassure, persuade, seek information and resolve conflicts.		
	**Thinking** – finding and evaluating information to make rational decisions or to organize work. We use this skill when we solve problems, make decisions, think critically and plan and organize job tasks.		
	**Digital Technology** – using computers and other technology. We use this skill when we use a Smart phone, operate cash registers, use word processing software, send emails and create spreadsheets.		
	**Working with Others** – interacting with others to complete tasks. We use this skill when we work as a team member and when we supervise or lead.		
	**Continuous Learning** – participating in an ongoing process of improving skills and knowledge. We use this skill when we learn as part of regular work, from co-workers and workplace training.		

Workplace Scenario: Precision Cabinets

Precision Cabinets is an Alberta-based, 100-employee manufacturing firm. This three-generation family business makes custom kitchen and bathroom cabinets and several stock models as well. The owner, Roger Crilly, is 53 years old and has been the president of the company for four years. Roger has worked at Precision since he graduated from trade school. He has worked in every area of the business, beginning on the manufacturing floor and moving into sales. He then took over the marketing of the business and eventually became the Vice President of Operations in charge of production. He intended to stay in that position for five to eight more years but became the President when his dad unexpectedly died.

When Roger was the VP of operations, he focused on updating Precision's manufacturing equipment. Much of the equipment was out-of-date and couldn't cut accurately anymore. Besides purchasing new equipment, Roger also invested in retraining the employees. Precision has an outstanding safety record: 785 days without a reported accident.

Although most of the machines have been replaced, Precision has one lathe that has not been replaced. This machine is not used often. It is only used on special orders that involve an unusual edge to be machined on the cabinet doors. The machine is so old that the safety latch has broken off. The machine is not set up on a specific production line. When it is needed, it is rolled out to the appropriate position on one of the five production lines. Because of its lack of use, the company did not invest in an exhaust vacuum to remove the sawdust. Therefore, whenever the old lathe is being used, the sawdust gets everywhere. The layer of sawdust on the floor and on other machines and products causes a mess and it makes the floor quite slippery.

Many employees have complained about this issue saying that an accident can happen at any time.

Task: Defining the project

After reading the workplace scenario, work with a partner or in small groups to answer the following questions using the information provided about Precision Cabinets.

Is this a project?
What makes this a project?
What is the basic problem?
What possible solutions can you offer?
What **expertise** do you think you need on the team?
What tasks are necessary to reach the solution?
What could affect the success of the changes you recommend? List some of the possible obstacles.

Key definitions

Charter – high-level document which recognizes the existence of the project and gives the project manager the authority to start planning activities

Continuous Learning – the Essential Skill of participating in an ongoing process of
improving skills and knowledge

Digital Technology – the Essential Skill of using computers and other technology

Discipline – an area of knowledge, a field of study

Document Use – the Essential Skill of finding, understanding or entering information in various types of documents

Efficiently – achieving maximum productivity with minimum resources

Employability – able to be employed

Enhance – to make better

Estimator – person who can forecast with accuracy the time and money requirements of a project

Evolve – to develop gradually, usually from simple to more complex

Expertise – skill or knowledge in a particular area

Forecasting – predicting

Loyalty – customer loyalty is when a previous customer will continue to buy from or use products made by a company

Manager – administrator of organizational policies, procedures and controls

Meeting facilitator – the individual responsible for keeping all people and personalities cooperative, productive and respected

Mobility – career mobility refers to the movement of employees across positions within a company, to other companies or occupations

Morale – the spirit of a group that makes the members want the group to succeed

Numeracy – the Essential Skill of using numbers to complete tasks

Oral Communication – the Essential Skill of using speech to exchange thoughts and information

Planner – person who can identify needed resources and tasks, then schedule activities

Problem solver – person who has the ability to see what everyone else sees and come up with a better solution

Project – temporary and unique endeavor undertaken to create a product, service or result

Project management – the application of knowledge, skills, tools and techniques to project activities to meet project requirements

Reading – the Essential Skill of understanding reading materials written in sentences or paragraphs

Risk – a situation involving exposure to danger or loss

Sponsor – individual or group of individuals who provides funds to execute the project

Strategy – a plan of action designed to achieve an overall aim

Team builder – cheerleader, coach, counsellor and teammate who is skilled at helping individuals succeed for the good of the whole

Thinking – the Essential Skill of finding and evaluating information to make rational decisions or to organize work

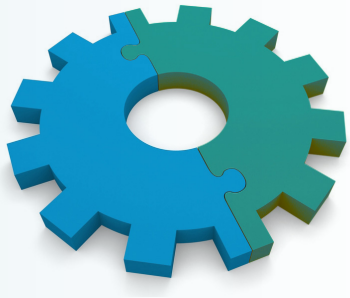
Triple constraint – the balance of cost, time and scope in a project

Visionary – someone who can see into the future, understand what can be, and describe it to others in a convincing manner

Working with Others – the Essential Skill of interacting with others to complete tasks

Writing – the Essential Skill of communicating by arranging words, numbers and symbols on paper or a computer screen

Intercultural **knowledge building**



Topic: What are the sources of power in the workplace?

Focus question

Briefly think about the following question before you start to read:

- **Do supervisors and subordinates interact or communicate in the same way in Canada as in your first culture?**

Power in the workplace

In Canada, in the mainstream business workplace, power is earned from co-workers, not given by a title such as manager, supervisor or **mentor** (coach). **Power** – respect from people and the ability to influence them – is earned through a balance of soft and hard skills.

Hard skills are technical skills that can be learned in school or from books. Hard skills are skills where the rules stay the same regardless of which company, circumstance, or country you are working in. For example, the rules for being "good" at using Microsoft Word are most likely the same in Canada, France or China.

Soft skills include communication, personal habits, behaviours and attitudes that affect relationships with other people. What are considered "appropriate" soft skills in the workplace can differ from one culture and country to the next. For example, being a "good" communicator in a Canadian workplace might not mean that you are a "good" communicator in a workplace in India or Australia.

Power is projected through communication

Since soft skills such as communication are so important in the Canadian workplace, and our power is earned by and projected through the words we use, it is important to understand what words we need to use for effective communication.

Often to get someone to do something, newcomers cannot use the same choice of words from their first language. A literal translation might sound too "bossy" or too weak in Canadian English, even though it is culturally correct in their first language or culture. For most

newcomers, this means a significant shift in their thinking about word choices as well as when to use opinion versus suggestion, when to agree and disagree, when to ask versus tell, and knowing how to explain ideas while speaking clearly.

Improve soft skills by understanding hierarchy

In a **hierarchical culture** (arranged in order of rank), the leaders and **subordinates** (people under the authority of another) are easy to identify and are treated differently. The leaders, considered to have high status, have specific attitudes and behaviours with regard to subordinates, or lower status people, within that culture. In a hierarchical culture it is considered appropriate to treat people of lower status much differently than higher status people, giving them direct orders, either explaining very little or carefully explaining every detail in case they don't get it right, assigning blame, not using polite words, and assuming that lower status people will do what they are told because that is their place in society.

In an **egalitarian culture** (all people equal), the leaders and subordinates are not so easy to identify. They have a hidden formal structure and consider respectful tone and language necessary for all classes and job titles, even though there is still the expectation that you never disrespect the boss. You are expected to do what your manager tells you to do but you may share low status jobs such as making coffee in the morning.

People from high hierarchy cultures tend to see egalitarian cultures as lacking in respect for their managers, elders and other people of high status. People from egalitarian cultures tend to see high hierarchical cultures as unfair, lacking in common courtesy or arrogant.

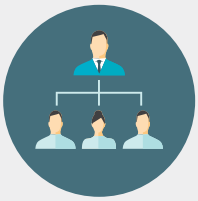
In Canada, although most workplaces are egalitarian, there are hierarchical workplaces where status difference is very obvious. For example, think about an engineering technologist in Canada moving from a career in a private company to a new job in the military, or vice versa. Even though the technologist's hard skills (technical drawing, machine use) may transfer easily between each organization, the soft skills (communication style, manners, etc.) in each workplace are quite different. For one thing, a private company has a more egalitarian culture while the military is very hierarchical. In the private company, influence and respect are earned over time while, in the military, power and respect are automatically **assigned** (selected or appointed) by rank, as with a sergeant or captain, and then further up the chain of command.

Exploring power distance and hierarchy

As a newcomer to Canada, you bring from your first culture a set of beliefs about how power should be given and used in the workplace. This is true for hierarchical cultures and countries such as Arab speaking countries, Russia, India and China. It is also true for more egalitarian countries such as Canada, Japan and Australia. In other words, it doesn't matter where you originate – you need to understand cultural differences about the sources of power if you are going to succeed as a leader in a workplace.

In the field of intercultural studies, people use the term "**power distance**" to describe the amount of authority, influence and status between workers. Power distance looks at how much a culture does or does not value hierarchy and respect for authority.

The table[4] below contrasts six common differences between high and low power distance cultures in the workplace. As you will see, high power distance cultures tend to be more hierarchical while low power distance cultures such as Canada are more egalitarian.

 **High power distance cultures (Hierarchical)**	 **Low power distance cultures (Egalitarian)**
Inequality People accept that inequalities in power are natural. They believe that some people will have more power than others in the same way they accept some people are taller and others shorter.	**Equality** People see inequalities in power as man-made and artificial. It is not natural, although it might be convenient and practical when some have more power than others.
Control Those with power emphasize it. They don't share it. They are, however, expected to look after subordinates.	**Delegate** Those with power tend to not emphasize it. They try to minimize the differences between themselves and subordinates. They **delegate** (hand over responsibility) and share power whenever possible.
Obey Employees might show respect to a superior by not questioning orders.	**Question** Supervisors expect everyone to contribute their ideas and expertise, to speak up when a mistake is going to be made, or even challenge decisions respectfully through suggestions or questions.
Defer Leaders make most decisions. Subordinates are closely supervised. Subordinates **defer** (put off) many decisions to that supervisor. They rarely disagree with their supervisor, or speak up when the supervisor is wrong.	**Show initiative** Subordinates are expected to show initiative. In the workplace, employees are not closely supervised and they have a lot of influence on decisions.

[4] Adapted from Geert Hofstede and Geert Hofstede, *Cultures and Organizations – Software of the Mind* (McGraw-Hill, 2005).

Formal They might use titles when speaking to their supervisors, or call them “boss”. Their first language will include specific words to show respect to a senior.	**Informal** Supervisors are known by their first names.
Dependence The subordinate depends on the supervisor to make decisions and resolve disputes.	**Interdependence** The supervisor-subordinate relationship is often one of **interdependence**, where both the supervisor and subordinate work together to make decisions and resolve disputes.

Comprehension questions

1. Which one of the following is the key source of power for a frontline leader in the Canadian workplace?
   a. Job title combined with the right education and credentials
   b. Choice of clothes
   c. Age, gender and/or ethnicity
   d. A combination of soft and hard skills
2. Which two of the following six behaviours do you think you are likely to see in the Canadian workplace?
   a. The supervisor-subordinate relationship is often one of dependence.
   b. Employees accept that inequalities in power are natural. They believe that some people will have more power than others in the same way they accept some people are taller and others shorter.
   c. Employees are expected to contribute their ideas and even challenge a supervisor’s decision respectfully through suggestions or questions.
   d. Leaders make most decisions. Subordinates are closely supervised. Subordinates defer many decisions to that supervisor. They rarely disagree with their supervisor, or speak up when the supervisor is wrong.
   e. Employees use titles when speaking to their supervisors. Their first language will include specific words to show respect to a senior.
   f. People with power tend to minimize the differences between themselves and subordinates. They delegate and share power whenever possible.

Task: Power in my workplace

Spend a few minutes reflecting on power in your workplace. What does it look like? Is it similar to the type of power you are familiar with in your home country? How does power affect projects or project management?

Key definitions

Assigned – selected or appointed (a job or duty)

Defer – put off

Delegate – hand over or pass on a task or responsibility to someone else

Egalitarian culture – all people are equal and have equal rights and opportunities

Hard skills – technical skills that can be learned in school or from books

Hierarchical culture – arranged in order of rank, from most important to least important

Interdependence – depending on each other

Mentor – someone who coaches another or shows them how to do something; an experienced and trusted person or teacher, an influential or senior supporter

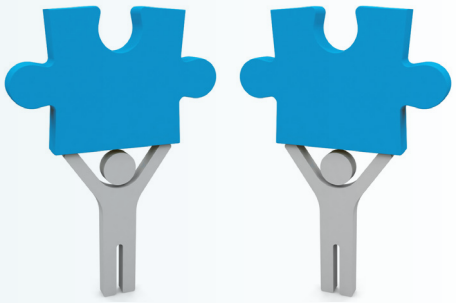
Power – respect from people and the ability to influence them

Power distance – the amount of authority, influence and status between a subordinate and a supervisor

Soft skills – communication, personal habits, behaviours and attitudes that characterize relationships with other people

Subordinate – person in a lower rank or position, person under the authority of another

Workplace Essential Skill building: **Oral Communication**



Topic: Participating in meetings

Focus questions

Briefly think about the following questions before you start to read:

- **Are you comfortable giving your opinions in a meeting?**
- **How do you check to make sure others have understood you?**

How can I be an effective participant in a meeting?

Communication is more than speaking or writing. To be effective, communication requires the creation of a common understanding of ideas, desires and observations among people. Effective communication is key to maintaining good personal and working relationships.

Meetings can be an extremely effective way of getting the ideas of several people at one time and reaching decisions. What you bring to a meeting – and what you don't bring – can give others a positive or negative impression of you. Prepare yourself for business meetings and follow a few simple rules to make yourself stand out like a star:

1. **Be respectful –** Arrive on time. Be well prepared with all meeting materials printed out, notes on the topic, and a pen and notepad to take notes.
2. **Be an active listener –** Listen with your full attention. You'll earn a great deal of respect and **credibility** (the quality of being believed in and trusted) by actively listening. "Hear" what the speaker is saying rather than thinking about what you want to say next. Show the speaker you're interested in what they have to say by using appropriate eye contact, positive **body language** (gestures and movements), asking short questions about the subject and letting them answer.
3. **State your opinions when appropriate –** Make sure that you have the organizer's permission to speak, and then clearly state what you have to say. Respect the rights of other people to disagree.

4. **It's okay to disagree or express another opinion –** If you disagree, say so in a constructive and non-confrontational way. Try to frame your concerns in a positive way with possibilities and "I" statements. Instead of "That will never work" say, "I have a concern that this might not work." Or point out the problem by asking a question. For example, instead of saying "You're wrong" you could say, "How do you see us ramping up production to meet that demand?" You have to state your concerns in a way that people will listen.

   Here are some useful phrases that can be used when disagreeing or expressing another opinion:
   - I would suggest…
   - But if we…
   - I'm afraid I have to disagree with you.
   - Don't get me wrong…
   - Even so, if…
   - Don't forget that…
   - Very true, but…
   - My concern with that is…

5. **Don't rattle on –** State what you have to say in as few words as possible. If you go on for too long, the point might be lost. If you overstate a position or try to dominate (take over) the discussion, you risk damaging relationships, and people will be less welcoming of your ideas.

6. **Don't be negative –** This includes not being negative toward your management, team members, co-workers, and customers. Think about what you are going to say before you say it, especially if it is during a heated conversation.

7. **It's not a competition –** You want to make sure your ideas are heard, but at the same time saying less is sometimes more. You will be seen as a mature leader if you do not argue, play mind games (mislead someone to gain an advantage), or obviously show you are trying too hard to get their attention. Be calm and professional.

8. **Check that you have been understood clearly and completely –** Communication is a two-way process. An essential part of giving information is checking how much of that information has been understood. To help others understand, the speaker must have a strong message that is communicated properly. Some guidelines are:

   - Communicate just one message at a time. Don't confuse the listener with a bunch of information that they will have to sort through.

   - Use clear language. Don't use a lot of **technical jargon**. Say exactly what is on your mind if you actually want people to get your point.

- **Use the appropriate method of delivery**. Detailed information should be written. Oral messages should contain minimal content.
- **Give an example** to support what you are saying. People learn from examples as much as they do words because examples create visual images.
- **Check for understanding**. After you give information, ask questions to make sure you have been understood. Use phrases such as:
  - Tell me what you just heard.
  - Are there any more questions?
  - I'd like to know what you understood from what I just said.
- Avoid questions with yes or no answers because people will often just say yes! Examples of questions to avoid are:
  - Are we all on the same page?
  - Have I made everything clear?
  - Everyone knows what they are doing?
- If someone has not understood you, **clarify** what you meant.
  - Sorry, I think you misunderstood what I said.
  - Sorry, that's not quite right.
  - I'm afraid you don't understand what I'm saying.
  - That's not quite what I had in mind.
  - That's not what I meant.
- Repeat information to make sure everyone has understood and/or provide a summary of what you have just said at the end.
  - Let me repeat that.
  - Let's go through that again.
  - If you don't mind, I'd like to go over this again.

9. **Follow up on action items** – Make sure that you know what actions were assigned to you, and follow up on them as quickly as you can. Think about how impressive it is when you see somebody else completes his or her action items immediately after a meeting. Following through with what you agreed to do in front of a group is a good opportunity to demonstrate that you do what you say you're going to do.

Task: Communication

All participants should arrange themselves as if they are in a meeting. The topic of the meeting is the changes that are being suggested in the Precision Cabinets scenario as well as the solutions you came up with. Each participant will be assigned an emotion card. During this "meeting", show your emotion in every appropriate way you can think. Express yourself in **non-verbal** ways (with facial expressions, gestures and posture) and **verbal** ways (with words). Try to guess which emotion the other participants are showing. Be prepared to discuss how this affected communication in the workplace.

How to agree and disagree in business situations

Read the following conversation from a Precision Cabinets business meeting where the chairperson is asking the attendees if they agree or disagree with Roger's suggestion for replacing the old machinery. Each participant demonstrates a different way to agree or disagree with the project manager.

Project manager:	"Now everyone, Roger has made the suggestion that we replace all of the out-of-date manufacturing equipment. I'm going to go around the table and ask if you agree or disagree with that suggestion, starting with Gail."
Attendee 1:	"**I'm afraid that** I don't agree. It's way too much money."
Attendee 2:	"**At the moment, I doubt** that replacing all the equipment will help bring more business in. So no."
Attendee 3:	**"I completely agree** with the suggestion. It's the most important change we can make."
Attendee 4:	**"I think the same** about the suggestion. It is a great idea."
Attendee 5:	"Well, with the uncertainty of the economy at this time, **it's totally out of the question**. We just shouldn't be spending that kind of money right now."
Attendee 6:	"**I understand** Roger's point, but at the moment, we need to save money and not spend it!"
Attendee 7:	**"I don't have a problem** with the suggestion. So, I agree."
Attendee 8:	"**It sounds interesting, but** I think we should wait a while before making any decisions."
Attendee 9:	"Yes, **don't you think it would be better** to wait until next summer? I can't agree to this, sorry."
Attendee 10:	"**To be honest, I believe** we can't afford it right now, so I'm disagreeing."

Key definitions

Body language – communicating through gestures and movements of the body

Clarify – make something less confusing

Credibility – the quality of being believed in and trusted

Non-verbal communication – facial expressions, tone and pitch of the voice, gestures, and posture used during communication

Technical jargon – industry terms with particular meaning within a specific industry or group of people; others outside this group probably wouldn't know these terms

Verbal communication – the use of words to communicate

Workplace Essential Skill building: **Writing**

Topic: Identifying stakeholders

Focus questions

Briefly think about the following questions before you start to read:

As a project manager:

- **What is an advantage of identifying stakeholders in the early stages of a project?**
- **What is the advantage of identifying negative stakeholders of the project?**
- **Should you devote the same level of effort to engaging all stakeholders?**

Why is the identification of stakeholders important?

Eighty percent of a project manager's job revolves around communication with the project team, client, management and other stakeholders (people or organizations that can be impacted by the project). Everyone who has a vested interest in the project is a **stakeholder**. Stakeholders can be company staff members, product/service end users, the public affected by the project as well as contractors and suppliers. The document which identifies stakeholders and their communication needs is called the stakeholder register.

- Communication problems can be minimized with better understanding of each stakeholder's communication needs.
- Communications planning involves planning for all the communications (phone calls, meetings, emails, memos, reports) with team members and project stakeholders.
- Effective communication creates a bridge between:
  - diverse stakeholders
  - various cultural backgrounds
  - different levels of skill and knowledge
  - various **perspectives** (ways of looking at a situation) and opinions

How to identify stakeholders

During the initiation process group, identify the stakeholders. Identification includes:

- The name of each project stakeholder or group of stakeholders
- Stakeholder's level of power in the project (generally identified as low/medium/high)
- Stakeholder's level of interest in the project (not all stakeholders have a high level of interest in your project, identifying the level of interest will allow you to determine the level of communication required with the stakeholder)
- Stakeholder's expectation of the project (this allows the project manager to determine what the stakeholders requires from the project)
- Communication requirements (this allows the project manager to determine the desired level of communication for each of the stakeholders)

Sample stakeholder register

Stakeholders	Level of power	Level of interest	Expectations of the project	Communication requirements
Key stakeholders - Bill Waldon (President, Waldon Construction)	High	High	To maintain the project within triple constraint	Weekly reports and updates on serious project issues
- Nancy Fee (CFO, Waldon Construction)	High	High	Project management administrator	Weekly reports and updates on serious project issues
Development team	Medium	Medium	Clear scope of work and support from project manager	Required to be informed of changes to the scope of the project
Client sponsor	High	High	Delivery of product as per specifications	Weekly reports and updates on serious project issues

Task: Stakeholder register

WORKPLACE SCENARIO

Steve of RSR Construction has a very successful company building custom homes for people. He is building a home for Mr. and Mrs. Gray. He and his project assistant begin each new home build by developing a stakeholder register.

In pairs, complete the stakeholder register. Add four other stakeholders that Steve or other employees of RSR Construction would have to communicate with. The first entry has been completed for you.

Be prepared to share your register with the class.

Stakeholders	Level of power	Level of interest	Expectations of the project	Communication requirements
Shawn Maas, journeyman plumber	Low	Medium	Clear understanding of the scope of work	Answer questions, address issues, view work that has been completed
1.				
2.				
3.				
4.				

Topic: Selecting the appropriate type of communication

There are many different ways to communicate and it is important to choose the right type of communication when you are in the workplace. The following chart[5] gives examples of the different types of communication and when it is best to use each form.

1 = Excellent 2 = Adequate 3 = Inappropriate

	Hard copy	Phone call	Voice mail	Email	Meeting	Website
Building consensus	3	2	3	3	1	3
Resolving a misunderstanding	3	1	3	3	2	3
Expressing support/ appreciation	1	2	2	1	2	3
Showing an important document	1	3	3	3	3	2
Asking an informational question	3	1	1	1	3	3
Making a simple request	3	1	1	1	3	3
Addressing many people	2	3	2	2	3	1

Choose the best method of communication for each project manager. Explain your choices.

a. A principal reminding all teachers that there is a staff meeting on Friday.

b. The project manager at a large meat processing plant has graphs and charts to show how well the team has been doing since their project began.

c. The PM at a car manufacturing company needing ideas about how to fix an issue with the new product being developed.

d. A hockey team's fundraising coordinator thanking all parent volunteers and asking for feedback on how to improve for next year.

[5] Adapted from: Tess Galati, Email Composition and Communication (EmC²), Practical Communications, Inc., www.praccom.com, 2001.

Topic: Creating a memo

One way to communicate to stakeholders about the status of a project is by **memo** (short for memorandum). A **memorandum** means something that should be remembered or kept in mind, and is intended to inform a group of people about an issue. A memo can follow the format below.

The Heading

1. **Memorandum** or **Memo** is typed in bold on the first line, near the top of the page. It can be centered or left-aligned. Larger font should be used for this word as compared to the rest of the memo.
2. **To**: person's name and job title. If this is being sent to all employees, write "All employees".
3. **CC**: means Courtesy Copy. Write additional names on this line. This is not the person to whom the memo is written but rather is someone who needs to stay informed about the information being sent.
4. **From**: include the full name and job title of the person sending the memo.
5. **Date**: write out the full date, spelling out the month and including the date and year that the memo is being written (like this: November 5, 2015).
6. **Subject**: or **Re**: (meaning regarding) state what the memo is about. Choose a specific phrase for this line that is short and to the point.

Example:

MEMORANDUM
To: All shop floor employees
CC: Gaurav Sharma, President; Anna Smyth, Lead Hand
From: Jody Quinn, Occupational Health and Safety Officer JQ
Date: December 8, 2015
Subject: New training for Personal Protective Equipment

The Body

The Body is the main part of your memo:

1. **Know your audience** – It is important to tailor the tone, length and level of formality of the memo to the audience who will be reading it.
2. **Don't use a formal salutation** – Salutations such as "Dear Mr. Benes" are not required in a memo.
3. **Introduce the problem** – State the problem or topic of discussion in the first paragraph.

Example continued…

> Personal Protective Equipment (PPE) is important for our workplace as it can help prevent serious injuries and save lives. It has come to my attention that some employees do not understand the importance of PPE and have not been wearing the protection required. In an effort to address this serious safety concern, the Occupational Health and Safety Division is implementing a program called "Stay Safe – Stay Alive" starting January 1, 2016. The goal of this program is to raise awareness about the importance of proper PPE in the workplace.

4. **Provide background information** – The reader will need this information to better understand the problem.
5. **Discuss the actions suggested to fix the problem** – Include evidence and logical reasons for the solutions provided. State why the readers will benefit from taking the action recommended, or what will happen if no action is taken.

Example continued…

> Employers have a legal obligation (duty or responsibility) regarding the provision and use of personal protective equipment. PPE is equipment that will protect the user against health or safety risks at work. It can include items such as safety helmets, gloves, eye protection, high-visibility (easy to see) clothing, safety footwear and safety harnesses. Everyone who works at Campbell Products needs to know how to work safely and without risks to health. As an employer, Campbell Construction is committed to making our workplace as safe as possible, which includes providing employees with the right information, instruction and training.
>
> Starting Monday, December 11, 2015, you can sign up to be the first to receive the training in the new year. After you sign up, you will be given a course package and will have an opportunity to provide suggestions for possible safety talks as well as sign up to lead a talk. If you do not sign up for the training by the end of December, you will be slotted in where space is available.

6. **Restate the action** – Mention again the action that the reader should be taking in the closing paragraph. This paragraph should also include a positive note about the organization.

Example continued…

> Please join me in this commitment and sign up for training beginning this Monday, December 11. Together we can make a difference in improving the safety and well being of our workplace.

Before sending

1. **Format the memo** – Use 12 point font such as Times New Roman or Arial. Use one-inch margins on the left, right and bottom. Do not indent each paragraph.
2. **Proofread the memo –** Edit for spelling, grammar and content errors. Ensure that it is clear, easy to read, and free of errors.
3. **Handwrite initials by the name –** There is no signature at the bottom of the memo so the person writing the memo should initial in pen beside their name in the heading to indicate that they have approved the memo. (Does not apply for memos that are sent through email.)
4. **Decide how to deliver the memo** – It can be handed out as a paper copy or sent out as an email.

Task: Write a memo

1. Write a memo related to the Workplace Scenario: Precision Cabinets. Re-read the example from the scenario and create a memo that outlines the action that has been decided regarding the workplace safety issue. You may focus on how the problem is going to be fixed, new training being offered for the lathe, proper procedures to follow when the lathe is in use, etc.
2. Email it to your facilitator.
3. Use the chart below to evaluate your own memo before you email it. Remember that 1 is the lowest score and 3 is the highest. Your facilitator will use this chart when marking your memo and for providing you with feedback.

Evaluation chart for memo activity

	1	2	3
Heading	"Memo" included but not bold or larger font. Some heading titles missing (such as CC, Subject, etc.).	All six parts of the heading included but some completed incorrectly.	All six parts of the heading included and completed correctly.
Body	Formality of the memo does not match the audience.	Some of the formality does not match the audience.	Formality matches the audience.
	The problem or topic is not clearly stated in the first paragraph.	The problem or topic may be in the first paragraph but it is unclear or poorly stated.	The problem or topic is clearly stated in the first paragraph.
	Background information to better understand the topic is not provided.	Some information is provided with the problem, but it does not help our understanding of the problem.	Background information is provided which does help us better understand the problem.
	The discussion section does state how to fix the problem but no benefits or consequences are stated. Ideas are disorganized and cause confusion.	The discussion section does state how to fix the problem but either the benefits or consequences are missing. Ideas could be organized more clearly.	The discussion section clearly states how to fix the problem, with benefits and consequences. Ideas are clearly stated.
	The last paragraph does not include a restatement of action or a note about the organization.	The last paragraph is missing either the restatement of the action to be taken or the note about the organization. Either is unclear.	The last paragraph re-states the action to be taken and includes a positive note about the organization. Both are clearly stated.

Before sending	Two or more incorrect: • Font too small or too large. • Font may be hard to read. • Margins not consistent • Paragraphs indented. Three or more spelling or grammar mistakes. A problem in more than one of the following areas: • inconsistent language • use of large words or technical jargon • message not clear • memo too long/short • does not follow format	One thing listed is incorrect. • Font too small or too large. • Font may be hard to read. • Margins not consistent • Paragraphs indented. Two or fewer spelling or grammar mistakes. A problem in one of the following areas: • language • jargon • message clarity • memo length • format	All three things done correctly: • Font is easy to read. • Margins look consistent. • Paragraphs not indented. No spelling or grammar mistakes. Consistent in language use. No unnecessary words or technical jargon. Clear, concise and persuasive message

Key definitions

Engaging – involving

Key stakeholders – stakeholders that have the power to exert pressure on the project manager throughout the duration of the project

Perspective – a particular attitude or way of looking at something or at a situation

Salutation – a standard set of words used in a letter to address the person being written to, such as "Dear Sir"

Stakeholders – people or organizations that can be impacted by the project

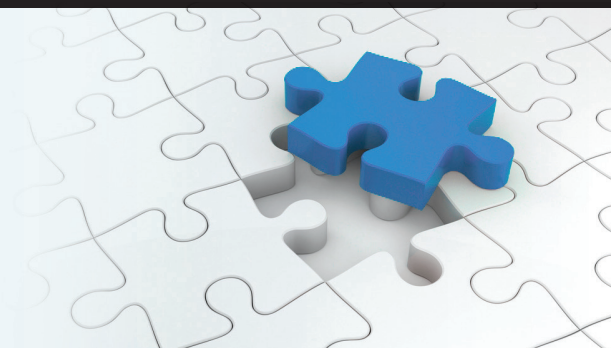
In-Class Module 2

Planning the Project

In-Class Module 2: Planning the Project

Contents

Project management **content knowledge**



Outcomes

- Understand all of the process groups of a project
- Understand more about the planning process group of a project
- Explore motivation and what it looks like in different cultures
- Learn the importance of speaking up in the workplace
- Gain skill in effective email writing

Making connections

Thinking about what you learned online, answer the following questions:

1. Did you learn anything new or different about project management from the online materials?
2. Have you ever thought about the projects you work on in terms of their process groups?
3. At your workplace, what departments are included in a project?
4. How does communication take place between the members of the project team? Is it working?

Topic: What is the planning process group?

Focus questions

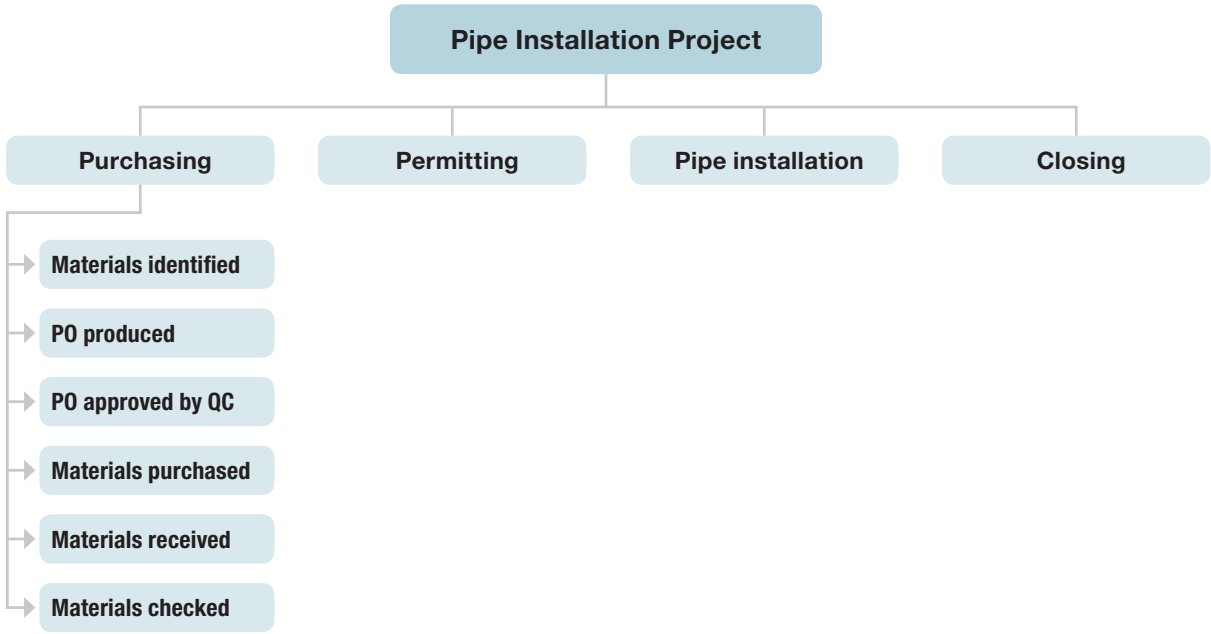
Briefly think about the following questions before you start to read:

- **What are some of the things you would do first when planning a project?**
- **Who do you involve in project planning?**

Six steps within the planning process of project management

Once the initiation process group of the project is complete we move on to the second process group. The second process group in project management is planning. Planning, also called forethought, is the process of thinking about and organizing the activities required to achieve a desired goal. Think of your plan as a map. If you drive a project around without a map or ignore the orientation clues, you are missing the main features of the project plan.

Sample work breakdown structure[1]



Step 1: Create a Work Breakdown Structure (WBS)

A WBS is a visual representation of the work which needs to be completed on a project. The advantage of developing the WBS is that it allows the project manager and his project team to break down the project work to a level where it becomes manageable. The more broken down your WBS is, the more likely you are to capture all elements of work which need to be completed.

A well-developed WBS will allow the project manager to more accurately estimate the project schedule and costs. The WBS showcases the decomposition of **deliverables** into work packages. A deliverable is a measurable component of work which needs to be completed on the project. Once you have identified your deliverables, then you break them down into more detailed components.

[1] Tarka Consulting Inc., 2016.

Task: Building a WBS

In this activity you will create a WBS. In your group, using the Workplace Scenario: Precision Cabinets from Module 1, identify the project's deliverables and break them down into individual tasks. Feel free to use Post-it notes.

Step 2: Project's critical path

During the planning phase it is also important to establish the critical path for the project. The critical path is the longest path on a network diagram and determines the earliest date on which work can be completed.

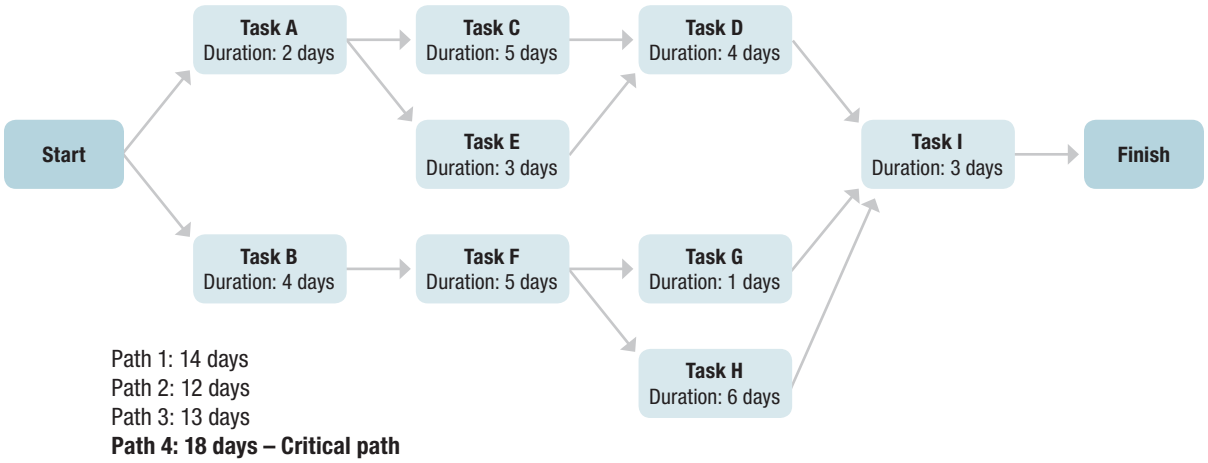
Critical path analysis is an effective and powerful method of assessing:

1. What tasks must be carried out
2. Where parallel activity can be performed
3. The shortest time in which you can complete a project
4. Resources needed to execute a project
5. The sequence of activities, scheduling and timings involved
6. Task priorities
7. The most efficient way of shortening time on urgent projects

Critical path planning provides a visual representation of project activities, clearly presents the time required to complete tasks, and tracks activities so you remain on schedule.

This method involves planning the needed steps to complete a project. It reduces uncertainty because you must calculate the shortest and longest time of completion of each activity. This method forces you to consider unexpected factors that may impact your tasks and reduces the likelihood that an unexpected surprise will occur during your project.

Sample critical path chart



The diagram shows how sometimes multiple tasks are happening at the same time.

All activities on the critical path must be completed as scheduled or the end date will begin to change which then affects the projected **budget**. It is bad practice to schedule a project so that overtime is needed to meet the original target dates because this leaves no latitude for handling any problems that might occur later.

Task: Building a critical path

This is a continuation of the previous activity (creating the WBS). In this activity you will put all the project tasks in sequence by developing a network diagram. Please follow these steps:

1. Create a schedule network diagram to sequence your activities.
2. After you have created your project schedule network diagram, go back to each activity and insert the duration that each activity will take. Make sure you use consistent time units (for example, if you decide to use days, use days for all your activities).
3. Calculate the critical path of your project.

Step 3: Identify the team

Now that you have completed your network diagram and understand your critical path, you need to start thinking about the individuals needed to perform the work. A key tool which may assist the project manager in organizing the team is the Responsibility Assignment Matrix (RAM). The purpose of the RAM is to identify the relationship between team members and various project activities.

These steps can be taken to develop a RAM

1. List all the people who are part of the project team.
2. List all the activities which need to be completed.
3. Match each person with each activity.
4. Identify the degree on each person's involvement in an activity using RACI.

RACI is the methodology used to construct the RAM. Responsibility or "R" is placed next to the person who is physically performing the activity. Accountable or "A" is placed next to the person who has supervisory authority over the person with the "R". Consult or "C" is placed next to the name of the person who's input is needed to complete an activity. Inform or "I" is placed next to the name of the individual who needs to be informed during or after the completion of the activity.

The development of the RAM ensures that your staff members only do the work which has been scheduled. It also allows the PM to ensure that effective and efficient communication occurs during the project. Below is an example of a RAM.

Responsibility Assignment Matrix (RAM)

Project: Demolishing the house at 216 Water's Edge Drive				
Team members	**Assemble demo team**	**Get demo permits**	**Turn off utilities**	**Demolish building**
Robert (PM)	R, A	A,C	A,C	A,C
Peter	I	I	R	
Mike	I			R
Ann	I	R		I, C

Step 4: Set the schedule

Once the project manager has decided on the tasks each member is responsible for, the project manager with support from the team can move on to creating a project schedule. It is a good practice to set a **drop-dead date** (a date that the project cannot go past). The project manager can then work backward from this date to create a realistic schedule, ensuring that each task is scheduled with enough time and in the proper order.

Steps for creating the project schedule[2]

1. Use an outline to develop a list of specific activities or tasks.
2. Assign a deliverable to each task.
3. Use deliverables as a basis for creating a project schedule with realistic milestones and due dates.
4. Identify **bottlenecks.** These are things that slow down the project and could upset the schedule.
5. Determine ways to remove bottlenecks or build in extra time to get around them.
6. Establish control and communication systems for updating and revising the schedule.
7. Keep everyone, including the stakeholders, involved in and informed of the project's progress and any schedule modifications.

[2] Adapted from Duffy, Mary Grace, "Managing Projects", Harvard Business School Press, Boston, Mass, 2006.

Tips for scheduling a project[3]

1. Know which deadlines are flexible and which ones are not.
2. No task should last more than four to six weeks. If it looks like a task will last this long, break it down into smaller tasks.
3. Don't schedule more details than you can handle yourself.
4. Develop schedules according to what is logically possible.
5. Record all segments in the same time frame like days or weeks.
6. Do not schedule a project with overtime built in. This does not leave any time for unexpected events.

Those administrating the project can use a table to organize the schedule. See the example below. Notice that the activities, requirements and time to complete are included in the table.

Example of project activities, requirements and timetable[4]

Project: Internet provider replacement		
Activity	**Requirement**	**Time to complete**
1. Determine company's internet needs		5 days
2. Research providers and costs	(1) needs to be completed	14 days
3. Meet with providers and hear pitches	(1) and (2) need to be completed	3 days
4. Choose provider	(1), (2) and (3) need to be completed	5 days
5. Set up install	All previous steps need to be completed	3 days

[3] Adapted from Duffy, Mary Grace, "Managing Projects", Harvard Business School Press, Boston, Mass, 2006.
[4] Adapted from Duffy, Mary Grace, "Managing Projects", Harvard Business School Press, Boston, Mass, 2006.

Here is another example of a table for scheduling. This table includes dates and activities. It easily shows outsiders and stakeholders what is happening when and it helps everyone to see the big picture. Keep it simple.

Project activities by date: Internet provider replacement project				
Activity	**March 1-5**	**March 8-14**	**March 15-21**	**March 24-31**
Determine company's internet needs	XXXXX			
Research providers and costs	XXXXX	XXXXX	XXXXX	
Meet with providers and hear pitches			XXXXX	
Choose provider				XXXXX
Set up install				XXXXX

Comprehension questions

1. What is the first step of the planning process group?
   a. Assemble the team
   b. Set the schedule
   c. Develop the budget
   d. Build a WBS
2. The critical path is the shortest path on the network diagram.
   a. True
   b. False
3. When scheduling tasks required for a project, you should use the same time measurement for each task, for example: weeks, months, days, hours.
   a. True
   b. False
4. What is the first step to scheduling project tasks?
   a. Identify bottlenecks that could upset the schedule.
   b. Assign a deliverable to each task.
   c. Use deliverables as a basis for creating a project schedule with realistic milestones and due dates.
   d. Use an outline to develop a list of specific activities or tasks.

Step 5: Develop a budget

The project budget is a detailed **estimate** (best guess) of all the costs required to complete project tasks. Budgets are financial projections. Individuals, businesses and governments use budgets to help to plan for the future. When managing a project, forecasting the costs through the use of a budget helps the project manager keep the project on track. Budget numbers can be based on **historical costs** (average costs in the past), engineering standards or other estimates. Budgets must be reasonable and attainable.

A budget can be a simple table or a complex spreadsheet. As the project progresses, the estimates can be fine-tuned. Be sure to include additional funds to cover unforeseen expenses This can either be a line item or included in each item listed.

Below is an example of a project budget.

Dispatch Center Project Budget Project #: AD1234 Estimated construction time: 9 months	
A. Land, utilities and developmental fees	
1. Land lease	430,000
2. City impact fees (water, sewer, fire, police)	22, 235
3. City road impact fees	18,200
4. City review and permit fees	29,910
5. Latecomers sewer fees	1,500
6. Miscellaneous fees	5,000
7. Electric and transformer service fees	32,457
8. Gas service connection fees	15,000
9. Communication connection fees	15,000
Subtotal	**$568,302**
B. Construction costs	
1. General conditions division 1	300,260
2. Building divisions 3-28	3,193,210
3. Site divisions 31-33	516,645
4. General contractor fees	320,809
5. Construction contingency	216,546
6. Anticipated VE (value engineering) savings	(62,000)
Subtotal	**$4,485,470**

C. Contingency fund (for an unknown event or circumstance)	
1. Escalation	224,273
2. Project contingency	448,547
Subtotal	**$672,820**
D. Design fees	
1. Pre-bond schematic design phase	55,248
2. Post-bond construction document and construction admin. phase	358,837
3. Consultants (geotech report and specialist reviews)	30,000
Subtotal	**$444,085**
E. Furnishings, fixtures and equipment	
1. Furnishings (14 offices, 1 large conference room and 4 small meeting rooms)	65,900
2. Equipment (communication, video, electronics, etc.)	460,550
3. Appliances and fixtures	5,000
4. Communication tower	125,000
Subtotal	**$656,450**
F. Miscellaneous expenses	
1. Construction testing	15,000
2. Commissioning	35,000
3. Legal, bonding, advertising	18,000
4. Moving expenses	4,000
Subtotal	**$72,000**
Total project costs	**$6,899,127**

Step 6: Create a communication management plan

A communication plan makes sure that effective and efficient communications with the project stakeholders take place throughout the duration of the project.

Item (what)	Audience (who)	Purpose (why)	Frequency (when)	Medium (how)	Owner (by whom)

Workplace Scenario: Precision Cabinets

With an overall corporate safety audit coming up in six months, Roger held a meeting with all factory employees and top management to discuss potential safety issues throughout the company.

You brought up the issues with the old lathe as the most pressing safety issue on the floor, saying that the safety latch is broken and it makes a mess with the sawdust. Also, the company is not equipped to clean the sawdust because all of the other machines are vented, and, even though the machine is portable, moving it around the plant is really difficult because of its weight and awkwardness.

Although other safety concerns were brought up, the group voted the old lathe machine to be the biggest problem. Roger completely agrees with this because he remembers that machine was broken and messy when he worked on the floor. He commended you for speaking up and put you in charge of fixing the problem. He said he would provides funds but the problem must be fixed well before the safety audit. He also said that you can use the resources of the company to get the job done. You were excited.

The very next day, you went into the plant before your shift started and spoke to some of the guys that worked on the old lathe. You asked for suggestions on how the problem might be fixed.

Several ideas were brought forward but you decided that with the time constraint and your desire to solve the problem using the least amount of money, you would get the safety on the machine fixed by your machining department and self-vent the machine into a bag instead of venting it into the central system. You also decided that putting the machine on a platform that could be moved by forklift would be the best way to solve the problem of moving the machine.

Task: Applying what you've learned

Read and discuss the workplace scenario above in pairs or small groups. Use the project information questions below as a guide.

Project information
What is the project purpose? What problem is it trying to solve?
Who are the stakeholders?
What are the project objectives?
What are the risks involved? Can you think of any trade-offs that you might have to make?
How long do you think this project will take? What are some factors that could cause problems with your timeline?

Key definitions

Budget – all the costs required to complete project tasks, a financial projection

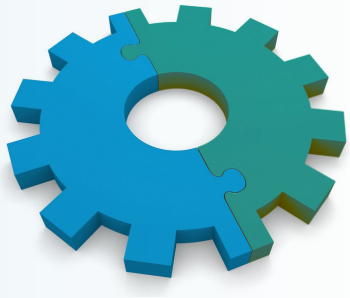
Critical path – longest path through a project and determines the earliest date on which work can be completed

Deliverable – what needs to be completed

Estimate – best guess

Planning – process of thinking about and organizing the activities required to achieve a desired goal

Intercultural **knowledge building**



Topic: What are the perceptions on motivation?

Focus questions

Briefly think about the following questions before you start to read:

- **What is motivation?**
- **What does motivation look like in the workplace?**
- **Does motivation look different for different cultural groups?**

In many workplaces, managers and supervisors talk about the motivation levels of their workers. They talk about some workers being very motivated and other workers not being motivated at all. This raises a few questions when looking at it from the frame of culture and the workplace.

What is motivation?

The definitions of motivation seem quite straight forward and are agreed upon between cultures.

> A force or influence that causes someone to do something.
>
> www.merriam-webster.com/dictionary/motivation
>
> Internal and external factors that stimulate desire and energy in people to be continually interested and committed to a job, role, or subject, or to make an effort to attain a goal.
>
> http://www.businessdictionary.com

What we need to look at more closely are the forces and influences that are referred to in the definitions. This is what makes motivation appear different between cultures. Let's first look at the two types of motivation.

Intrinsic versus extrinsic motivation

All cultures have **intrinsic** and **extrinsic motivators**. Intrinsic motivators are the internal factors that make us want to do something (want to do a good job, make us feel good). Extrinsic motivators are external factors that make us want to do something (we get paid, we will get an award).

Task: Self reflection on motivation

Spend a few minutes **brainstorming** and writing down what your motivators are. Look at the intrinsic and extrinsic things that make you want to do something. Consider your motivators in both work and personal situations.

Individualism versus collectivism

To clearly understand our motivations we need to look at our cultures a little more closely. Cultures can be individualistic or collectivist.

Individualistic cultures tend to place high value on equality, freedom, material comfort, task completion and punctuality. Typical behaviours include frustration with lateness and frustration with “wasted time” and prefer to “get right down to business” in meetings and discussions.

Collectivist cultures tend to value consensus, cooperation, harmony and patience. Affiliation with others and human relations are important, so individuals are more likely to forgive lateness and to take time to establish a relationship before getting down to business.

The following chart explores the differences in workplace language and behaviours associated with each of these cultures.

Individualistic and collectivist behaviours

The following chart[5] compares the differences in behaviour between individualistic and collectivist cultures.

	 **People from individualistic cultures tend to:**	 **People from collectivist cultures tend to:**
Language	Use the word "I" extensively Describe personal accomplishments	Use the word "we" extensively Describe group (department/company/ team)
Communication	Have a narrow distribution of information (few people included)	Have wide distribution of information (many people included)
Teamwork approach	Follow the motto: "Let's each do our own job." Focus on one's roles and responsibilities Not follow closely what other team members are doing Provide help upon request	Follow the motto: "One for all, all for one." Focus on relationships within the team Keep track of what team members are doing Provide help when they consider that help is needed (even when no help has been requested)
Decisions	Make decisions based on the impact of these decisions on their own areas of responsibility Expect people responsible for other areas to speak up if the decisions they make impact them adversely	Make decisions based on the impact of these decisions on whole group Expect everyone to take into consideration the impact of their decisions on every other member of the team
Compensation	Be motivated by individual incentives (as opposed to group incentives)	Be motivated by team or group incentives (as opposed to individual incentives)
Networking	Have their own individual network that cannot be shared with others	Share their network with other members of their group
Vacations	Take their vacations alone or in small groups	Take their vacation with others (family, organized tours, etc.)

[5] Adapted from Laroche, Lionel and Yang, Caroline, "Danger and Opportunity: Bridging Cultural Diversity for Competitive Advantage", Routeledge, New York & London, 2014.

Task: Understanding your culture

In looking at the chart above do you recognize yourself and your culture? Is your culture oriented toward individualism or collectivism? How would these differences affect your perception of motivation in the workplace?

The Herzberg Theory (Two Factor Theory of Motivation)

One of the most often cited theories of motivation is the Herzberg Theory. It identifies two sets of factors that influence job satisfaction and these are describes as motivators and hygiene factors.

Motivators: factors such as achievement, recognition, responsibility, advancement and the work itself.

Hygiene factors: salary, interpersonal relations, technical supervision, working conditions, company policies, administration and so on.

These two distinct sets of motivators are of different value dependent on cultural norms.

The following are examples of cultures motivations according to the Herzberg Theory and can be described as motivators or hygiene factors according to the definitions above.

These descriptors are based on survey data that has been compiled:

- French and Italian employees valued job security highly while American and British workers held it of little importance.
- Scandinavian workers placed high value on concern for others on the job and for personal freedom and autonomy but did not rate **getting ahead** very important.
- German workers ranked security, fringe benefits and getting ahead as very important.
- Japanese employees put good working conditions and congenial work environment high on their list but ranked getting ahead quite low.

Task: Motivation in the workplace

In small groups, decide if the following behaviour represents a lack of motivation in the workplace.

- Vince's supervisor told him to clean up the area and then wait for him to give him his next job. Vince finished the cleanup 30 minutes ago and is sitting at the table in the work area waiting for the supervisor. The supervisor got called to another area of the job so was late getting back to Vince. The supervisor is angry because Vince is unmotivated.
- A group of workers from the same country sometimes communicate in their own language at the workplace. Their supervisor thinks they are fooling around and wasting time when they do this.

Key definitions

Brainstorm – solving problems, gathering information, creative thinking and developing new ideas

Collectivist cultures – value consensus and the opinion of others; affiliation with others and human relations are important

Extrinsic motivators – external factors that make us want to do something

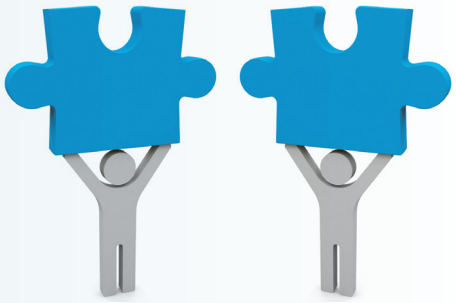
Getting ahead – achieving success

Individualistic cultures – place high value on equality, freedom, material comfort, task completion and punctuality

Intrinsic motivators – internal factors that make us want to do something

Motivation – a force or influence that causes someone to do something

Workplace Essential Skill building: **Oral Communication**



Topic: How can I speak up at work?

Focus questions

Briefly think about the following questions before you start to read:

- **What does it mean to speak up?**
- **Is speaking up easy or difficult in a workplace setting?**
- **Are there people you are more comfortable speaking up with than others? What makes the difference?**

Speaking up at work and in team meetings

Often when you are working on a team you may have to speak up. It could be in a meeting, on the phone, or one-on-one. You may have to share your opinion or knowledge with other team members, customers, vendors, your boss or project manager. This can be intimidating. We often talk ourselves out of speaking up, convincing ourselves that our input or opinion is not worthy of being heard. Believe that you *are* valuable and you have something to contribute. Keep the following tips about the right way and the wrong way to contribute.

Be sure not to bring up *everything* – Instead, talk to your boss only about observations and ideas for policies, processes, procedures or products you think can be improved.

Do your homework first – Think about the point you want to get across before you speak. If possible, find out the history and politics behind those areas you want to change. Keep your emotions in check when speaking to your supervisors, and try to propose at least one suggestion for doing things differently or solving the problem. Make sure your suggestion is realistic and functional for your team or company.

Example

Complaining about the fluorescent lights isn't valuable. Having a specific plan for increasing natural light in the office and improving productivity as a result is much better. You could even show your supervisor the numerous studies that link lighting and environment to productivity.

Here are some tips for speaking up in a good way:[6]

- **Lay some groundwork** – If you have supported your boss or project manager in the past, you probably have earned some credibility with them. This will make them more open to your ideas and suggestions for possible change.
- **Know the person you are talking to** – People have different communication styles. Some are formal and may prefer to receive ideas and suggestions in writing while others may just want to meet while they walk or during a coffee break.
- **Be positive, stay away from blame** – Focus on the benefit of your idea. People are often personally attached to their idea or the way they have always done something, so attacking the idea can feel like attacking the person.
- **Timing is everything** – Suggesting a new idea during the heat of an active project or deadline can often work against you. Complete your current task or project. Then propose your idea during calmer times when others are able to listen.
- **Frame the problem as your perception, not as a fact** – "This procedure is all wrong" is a lot less effective than "This procedure appears to be making it more time-consuming for staff to produce monthly client reports." While the issue may seem obvious to you, understand that you're still offering your point of view. Approaching your boss with this humble attitude will only help your cause.
- **Find the idea champions in your company** – These people generally welcome new ways of thinking and might just support your suggestion. Go to them first to get feedback. If you're an **introvert** (shy person), it may help to practice your presentation to a supportive audience before presenting it to those above you.

Task: Speaking up

In groups of three or more, choose one of the following scenarios. One participant should be the speaker in the scenario and the other participants should be employees in the meeting. Decide on your roles and then take a couple of minutes to use the chart below to make notes of the problem, who it affects and what the potential cost is. Write down what is effective communication and what you would change.

Practice checking that you have been understood, agreeing, disagreeing and giving a different opinion, using the phrases you just learned. The "meeting" should take about five minutes.

[6] Adapted from: www.careerattraction.com/want-to-stand-out-at-work-speak-up

SCENARIO 1

During the weekly project meeting with the development team, Rodrigo, the project manager, tells the team that the project is three weeks behind to build the newly designed tractor part. This part will be used to improve the fuel efficiency in tractors, something that is very important due to the high cost of fuel. The part has to be designed, engineered, manufactured, tested and checked by quality assurance. Rodrigo begins to explain that the part is behind because of the slow work by the design team. Others believe the problem may be due to something else.

SCENARIO 2

Dominique and the project team are at the beginning of a project to re-organize a meat processing facility to improve efficiency. Freezers are used for beef. There is a large freezer for carcasses and a smaller freezer for finished product. Coolers are used for pork. There is a large cooler for carcasses and a smaller cooler for finished product. There is a dry storage area for supplies such as salt, spices, casings, and packaging materials and a separate area for chemical storage. Dominique suggests that the dry storage area be right next to the chemical (bleach, cleaners) storage area, but members of her team believe that this could pose a health risk.

SCENARIO 3

Yasmine is a project team member at Vital Health pharmaceutical manufacturing company. The project involves implementing workplace training in the Essential Skill of Document Use, to be delivered to all employees, which will then lead to other types of training including management training courses. The project manager suggests that Document Use training be offered to employees after their shift has ended. Yasmine believes that most of the employees will not be able to stay for this because of other commitments such as childcare.

	Safety concern or issue	Who is affected and how?	What is the cost (time and/or resources)?	Effective communication
Scenario 1				
Scenario 2				
Scenario 3				

Topic: Dealing with difficult people

Focus questions

Briefly think about the following questions before you start to read:

- **Have you had to deal with a difficult person at work?**
- **What was it that made them difficult?**

Four types of difficult people

Below is a chart[7] explaining four different types of difficult people we all have had to deal with at work:

Downers	Sometimes called "Debbie downers" because they always have something bad to say. They complain and judge often. Nothing seems to please them.
Better-thans	Also called "one-uppers" or "show-offs". They are constantly trying to impress, make comparisons, or drop names.
Passives	Also known as "push-overs". They may speak very little in conversation and give one-word answers to questions. They will dodge the hard work and let others do it.
Tanks	They can have terrible tempers. They always want things done their way and will do anything to get it.

[7] Adapted from: www.scienceofpeople.com/2014/03/4-types-difficult-people-deal

Task: Types of difficult people

Discuss with a partner your experience in dealing with each of the four difficult types identified above.

Come up with a recommendation for each difficult person and share your recommendations with the class. You may use the list below. Make note of some of the recommendations on the board.

Options for dealing with difficult people:[8]

- Acknowledge the difficult person. Sometimes this is all they want.
- Try to understand them. Listen to them and try to understand their values and what they want.
- When listening, slightly tilt your head. This body language makes people feel that they are being heard.
- Find something to agree on. Sometimes by changing the subject you can find something that you agree on. This creates a bond with the person.
- Break the pattern. Often people behave like robots. We react in the same way to certain triggers. When you see someone repeating a negative pattern of behaviour, try asking a question completely off-topic. This may prevent them from continuing with the pattern.

Key definition

Introvert – shy person

[8] Adapted from: www.scienceofpeople.com/2014/03/4-types-difficult-people-deal

Workplace Essential Skill building: **Writing**

Topic: How do you write effective emails?

Focus questions

Briefly think about the following questions before you start to read:

- **How do you use email in the workplace?**
- **Do you have any issues or concerns with email?**

Using email for information distribution

Recall that in Module 1 you learned about the four steps involved in project communications.

Project communications involves four steps:

1. Communication planning
2. Information distribution
3. Performance reporting
4. Project closure

One of the ways a project manager distributes information is through email. Besides face-to-face conversations, emails are the most common way for coworkers to talk to each other. Emails are used to share workplace information, make decisions, and conduct other important workplace conversations. In fact, more and more decisions are being made by email than ever before. It's important to be able to send emails that are clear and **concise** (brief but comprehensive).

Work emails are different than emails you send to friends or family. Work emails should have correct grammar, spelling, and punctuation. They should have the right tone – more formal for important discussions and more informal for building positive workplace relationships. It's always a good idea to proofread a work email before you send it. You need to make a good impression!

Before you begin to write an email, ask yourself two questions:

- Who am I writing to?
- Why am I writing?

The first question asks you to focus on the audience for your email. Is it your boss? Another co-worker? Someone outside your company?

Think carefully about your audience.

- What do they need to know?
- How many other people need to know the same information?
- Do you need to use a formal or informal tone when writing the email?

Work emails should focus on your audience's needs, not on your needs. You are the communicator. You need to make sure your audience understands your message and takes action. You need to be clear and brief. People don't have time to read long email messages.

The second question asks you to focus on the purpose for your email.

- Why are you writing?
- What is the main idea or main message?
- Do you need to give information, discuss a problem, or continue a conversation?

How you organize the message in your email will depend on your purpose for communicating.

Choosing formal or informal language for an email

The tone of language you choose for your email message depends on the relationship you have with the person to whom you're sending the email.

Use more formal language if:

- You have never met the person to whom you are sending the email.
- The person you're sending the email to has a higher position than you.
- You are sending an email to a customer of your company.
- You are requesting a service.
- You are asking a favour.

Use more informal language if:

- You know the recipient of the email very well.
- The person you're sending the email to has the same level position as you.
- You are catching up with a person whom you haven't seen for a long time, or a co-worker who has just returned from vacation.

Using the 3-30-3 technique when writing emails

The 3-30-3 model works very well for speaking at work and in email writing. Let's quickly review the 3-30-3 model:

3 If I had only 3 seconds to speak, what would I say?

30 If I had another 30 seconds, what points best support that main point?

3 If I had an extra 3 minutes, how would I expand each point?

In 3-30-3, the main idea is always first. That's a good way to start an email. Email messages usually start with the general or main idea and then get into specifics after. Here's what that looks like in the 3-30-3 model:

3 One sentence that states your main idea or purpose for the email.

30 2 to 3 sentences that state the 2 to 3 most important sub-points or facts about the main idea or purpose.

3 A couple of sentences that support each of the sub-points.

Here's what it looks like in a sample email. The numbers in the email indicate which part of the 3-30-3 model it relates to.

A 3-30-3 sample email

Subject line:	Re: Fire drill procedures – Review by Jan. 2
Greeting	Hi everybody,
3	I hope you've read the Fire Drills Policy by now. You need to know it before we have our first practice fire drill.
30	Fire drills are important because they help keep our workers and anyone else who's in the building safe. Practicing fire drills helps us comply with the Occupational Health and Safety Code.
3	Keeping workers and others in the building safe is our number one priority. The more quickly we can perform the fire drill, the faster we will be if there is a real fire. It's not just about the Occupational Health and Safety Code. We care about you. Being able to perform the fire drill quickly and efficiently can save lives.
Closing	Please take care, Hal

Questions

1. Is the email formal or informal?
2. How can you tell?
3. How could you change it to make it the other style?

Task: Writing an email

Use the 3-30-3 technique write and send a short email to your course facilitator. Remember to write an appropriate subject line.

Answer the following question:

- What is your most recent challenge in managing or being involved in workplace projects?

Write the email about only **one** of the following topics:

- Assigning tasks and teams
- Problem solving
- Decision making
- Schedules, timelines and deadlines

Send your email to your facilitator **3 days before** the next face-to-face workshop.

Use the chart below to evaluate your own email before sending it to your facilitator. One is the lowest score and three is the highest. Your facilitator will use this chart to give you feedback on the email you send.

Evaluation chart for email activities

Categories of performance	1	2	3
cc and bcc use	Both cc and bcc used incorrectly	Either cc or bcc used incorrectly	Both cc and bcc used correctly
Subject line	Subject line is off topic or doesn't make sense	Subject line there, but too long or uses the wrong key words	Subject line short and uses key words to grab attention of the reader
Organization of the message in the body of the email	Ideas in the email are disorganized and cause confusion of meaning	Ideas in the email do make sense, but could be organized more clearly	Ideas in the email flow from point to point and create clear meaning

Key definition

Concise – brief but comprehensive, giving a lot of information clearly and in a few words

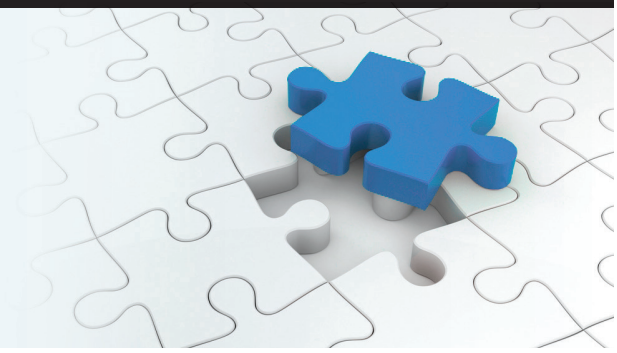
In-Class Module 3

Project Execution

In-Class Module 3: Project Execution

Contents

Project management **content knowledge**



Outcomes

- Gain an understanding of the steps projects go through during the execution process group.
- Appreciate the process of keeping a project on track.
- Understand problems that may occur during this process.
- Know how to be an active listener.
- Know the purpose of a performance report and what type of information should be included.

Making connections

Motivating people is a big part of what managers do. Some do it well and some do not. Discuss your post from this week. Also comment on others' experiences. What did you learn from these experiences that you can take into your role on project teams?

Topic: Monitoring and controlling the project

? *Focus questions*

- **What do you think the difference is between monitoring and controlling?**
- **Which is most important?**
- **What Essential Skills are needed to monitor and control a project?**

As we learned online **monitoring** and controlling occur throughout the project. Anytime we check what is happening in the project is meeting the goals and standards set out in the project plan. It is important to clearly understand the differences in the two concepts so we ensure that the actions needed to control the project are taken.

Monitoring and controlling project work includes tracking, reviewing, and reporting the progress to meet the performance objectives defined in the project management plan.

The *PMBOK Guide* glossary defines these two terms as:

Monitor – Collect project performance data with respect to a plan, produce performance measures, and report and disseminate performance information.

Control – Comparing actual performance with planned performance, analyzing variances, assessing trends to effect process improvements, evaluating possible alternatives, and recommending appropriate corrective action as needed.

When monitoring project work, you're performing the following activities:

- Collecting information about the project performance
- Providing forecasts for future work
- Tracking and analyzing risks
- Communicating the status of the project

When controlling the work, you are

- Comparing the information with the project management plan
- Compiling and analyzing the information
- Developing preventive action plans to keep the project within the variance thresholds
- Developing corrective action plans to bring the project back within the variance thresholds
- Recommending defect repairs for processes that allow poor performance
- Submitting change requests ((formal request to modify, adjust or change something in a project) to implement the preventive and corrective actions, defect repairs, or other necessary changes

Topic: What is problem solving?

Focus questions

- **What makes some problems more difficult to solve than others?**
- **Do you approach every problem the same way?**

In project execution, the project manager has two key responsibilities: following the project management plan and solving issues as they arise. Issues are called problems in project management. No matter how detailed your project management plan is, in execution there is

always a chance that you will encounter issues. Problems may arise with the project sponsor or project team members. The sources of these problems may range from team members who don't do what you want them to, meeting project standards, or schedule delays. Regardless of the source, it is important for a project manager to have the right skills and knowledge to deal with these problems.

Problem solving is a skill that every person needs: on projects, in the workplace and in life in general. Project managers use problem-solving skills to solve the problems that arise during the project's life. Problem solving usually requires **critical thinking** (thinking that is clear, rational, open-minded and informed by evidence) and decision making as well.

There are simple, complicated and complex problems.[1]

Type of problem	Description	Example
Simple 	Simple problems involve some basic issues of technique and terminology, but once their "formulas" are mastered, following them almost always guarantees success.	**Following a recipe** • Recipes are essential • Recipes are easy to replicate • Expertise is helpful but not required • Produces a standardized product • Best recipes give good results every time
Complicated 	Complicated problems are complicated due to their scale, issues of coordination and the need for specialized expertise. However, following one success, the probability for replication and repeat success is high.	**Launching a rocket** • Formulas are critical for sending rockets • Sending one rocket successfully increases the likelihood that the next will be successful • High levels of expertise needed in multiple fields • Rockets are similar in critical ways • Success with rocket increases certainty for success with next
Complex 	Complex problems are based on relationships and their properties of self-organization, interconnectedness and evolution. They cannot be understood with only simple or complicated approaches. Approaches based purely on policy, planning and management don't work.	**Raising a child** • Formulas have limited application with a child • Raising one child gives experience but no likelihood of success with the next child • Expertise is useful but insufficient for success • Each child is unique, different and must be approached individually • Uncertainty of outcomes remains

[1] Adapted from Glouberman, S., and Zimmerman, B. (2002).

Task: Identify where the problems fits

Read through the definitions of simple, complicated and complex problems. Work with a partner. Decide where the following examples of problems fit in the above chart. Discuss as a class.

- Implementing new safety regulations in an organization
- Entering a confined space filled with flammable gases to rescue an injured co-worker
- Using an air-activated power tool

Topic: Problem-solving model

Problem solving includes identifying the problem, the complexity of the problem, and the steps to a solution. Many problem-solving models exist. Outlined below is the 5 Whys technique. This model should become part of your project-related tools.

With problem solving, practice makes perfect. Practice using the 5 Whys technique often, and it will become second nature and help improve your problem solving abilities.

The 5 Whys[2]

- The 5 Whys model is a question-asking strategy you can use to identify the cause-and-effect relationships underlying a problem.
- The purpose is to determine the **root cause** of the issue. The technique was developed within Toyota as a key part of Lean Manufacturing.
- By asking "why" five times, the nature of the problem as well as its solutions become clear.
- The questioning could go to a sixth, seventh or higher number of "why" questions. However, five "whys" are usually enough to get to the root cause of the problem. From this point you need to decide how to fix the problem.

Example

Problem: Vehicle won't start

- *Why* – The battery is dead.
- *Why* – The alternator is not working.
- *Why* – The alternator belt has broken.
- *Why* – The alternator belt was old and no one had replaced it.
- *Why* – The vehicle was not maintained according to the recommended service schedule.

[2] Adapted from www.mindtools.com, www.mindtools.com/pages/article/newTMC_5W.htm

Task: Solving problems

Read through the workplace scenario below. Work in small groups to complete the activities that follow.

SCENARIO

You are the owner-operator of a small construction company that specializes in building residential properties. You act as the project manager to ensure the scheduling of deliveries, allocation of resources, contracting of sub-contractors and crew performance is well organized. This project involves building a large two-story house. Your core work crew consists of three experienced workers and a number of subcontractors.

Your project today is to complete the primer throughout the house and at minimum finish the final coats of paint on the upper level because the floor crew arrives tomorrow to begin installation upstairs.

Your crew's project schedule

Yesterday, Monday

- The crew prepped the walls and covered all the windows in plastic in preparation for the spraying of the primer.

Today, Tuesday

- According to the project schedule, your crew must apply the primer upstairs to ensure it is ready for the paint by noon.
- The crew is scheduled to arrive at 7:30 am at the job site to apply the first coat to both upstairs and downstairs.
- The paint sprayer clogged and then the nozzle broke. This required a replacement to be ordered. Luckily the supply store has one in the next city and can arrange a noon delivery.
- Only two crew members arrive on site at 7:30 am for work to apply the first coat. One crew member has not shown up.

Tomorrow, Wednesday

- At 8 am, flooring sub-contractors will arrive to begin the upstairs install. They can reschedule their installation work, but it will be two weeks from today. You have promised completion of the house three weeks from now and the owners have scheduled delivery of appliances and furniture to coincide with this date.

What is the plan?

The painting must be complete and have at least 8 hours of drying time before the flooring crew arrives at 8 am. To complete all the painting on the upstairs floor in one day, the project manager must make some changes to his plan. What are the problems he needs to solve?

Using the 5 Whys model

There are at least two problems in the scenario above, each with a different cause and result.

a. In groups of two or three, apply the 5 Whys model to establish the problems that need to be solved.

b. How would you approach the problems if you were the project manager that morning?

Key definitions

5 Whys model – a question asking strategy that will help to determine the root cause of an issue.

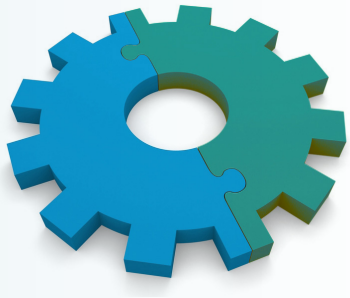
Change requests – a formal request to modify, adjust or change something in a project. It states what needs to be accomplished, but leaves out how the change should be carried out.

Critical thinking – thinking that is clear, rational, open-minded and informed by evidence.

Monitoring – observing and checking the progress or quality of something over a period of time

Root cause – the fundamental reason for the occurrence of a problem

Intercultural **knowledge building**



Topic: Cultural types

So far we have looked at the many pieces of the project from a perspective that is **linear** (moving from one stage to another). We began to address the idea of problems and trade-offs. What we haven't discussed is the way that our perspectives are influenced by our cultures and how these perspectives can sometimes cause tensions among the project members.

Look at the following chart.[3] It describes three distinct styles that develop within us as a result of our background and culture. As you read the chart, try to find yourself in the descriptions.

Linear-active	Multi-active	Reactive
Talks half the time	Talks most of the time	Listens most of the time
Does one thing at a time	Does several things at once	Reacts to partner's action
Plans ahead step by step	Plans general outline only	Looks at general principles
Polite but direct	Emotional	Polite, indirect
Partly conceals feelings	Confronts emotionally	Never confronts
Job oriented	People oriented	Very people oriented
Sticks to facts	Feelings before facts	Statements are promises
Truth before diplomacy	Flexible truth	Diplomacy over truth
Sometimes patient	Impatient	Very patient
Limited body language	Unlimited body language	Subtle body language
Respects officialdom	Seeks out key person	Uses connections
Separates the social and professional	Mixes the social and professional	Connects the social and professional

[3] Adapted from Lewis, Richard D., "When Cultures Collide: Leading across Cultures", Nicholas Brealy Publishing, Boston, 2006.

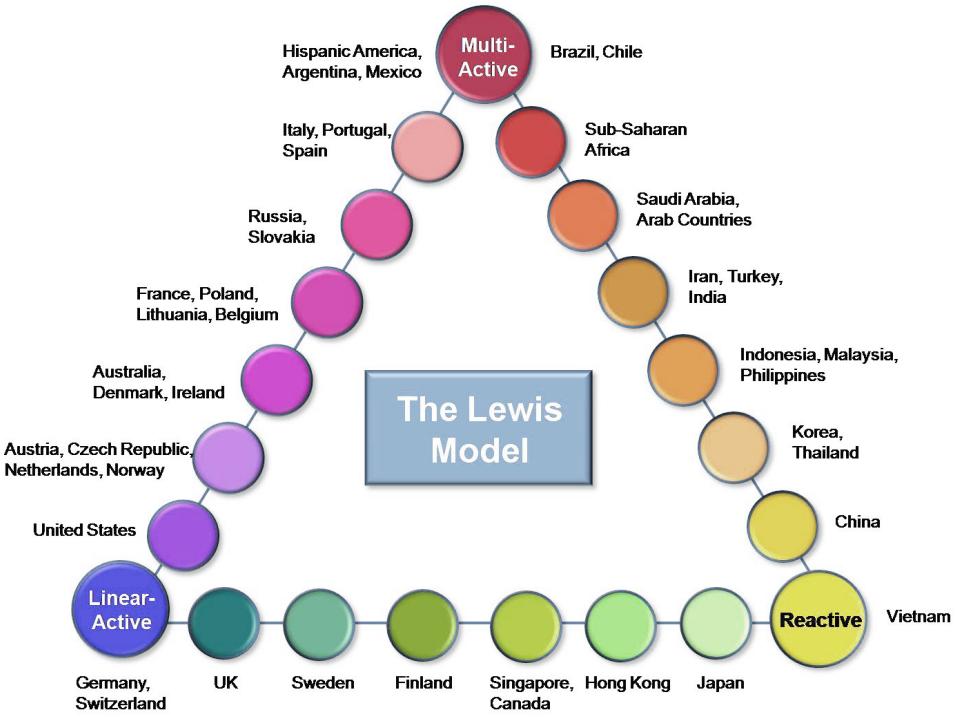
Task: Talking about culture and perspective

In small groups, spend a few minutes going over the chart. In a previous lesson we learned that different feelings and personalities can affect a workplace meeting.

- How would the behaviours in the chart above that are culturally based affect a workplace meeting?
- How could these different perspectives affect a project you are participating in or managing?
- What are the positives and negatives of having more than one approach to teamwork involved in a project?

The following diagram[4] outlines where a variety of countries fit in relation to the three styles. Find Canada on the diagram, then find your country on the diagram. Then consider the other people in your group.

- How would the differences influence your working together?
- How could conflict arise because of these cultural backgrounds?



[4] Lewis, Richard D., "When Cultures Collide: Leading across Cultures", Nicholas Brealy Publishing, Boston, 2006.

Topic: How does perspective influence our work and our team?

The picture below shows how people can look at the same thing, but see it differently. Often conflict is caused by this same dynamic: people are looking at, hearing about, or imagining a situation from a different angle. Conflict happens when you don't take the time to understand the other perspective.

If we reflect back on the chart above can you see where our different cultural perspectives can increase the opportunity for conflict to occur in the workplace? Gaining understanding of the differences can help you adapt to the Canadian workplace, but it might also provide you with a way to use your perspective without causing conflict.

Topic: What is conflict?

Focus questions

- **What is conflict?**
- **How might what we have learned so far affect conflicts we may have in the workplace?**
- **What do you think are some of the benefits of conflict?**
- **What does conflict look like in a workplace?**

Conflict

- a struggle for power, property, etc.
- strong disagreement between people, groups, etc., that results in often angry argument
- a difference that prevents agreement: disagreement between ideas, feelings, etc.

www.merriam-webster.com

Conflict can be broken into four categories.

Intrapersonal (within people) Example: There are things going on within a person that are causing him/her conflict.	**Interpersonal (between people)** Example: Two team members are not seeing things from the same perspective and are resisting each other's view.
Intragroup (within groups) Example: More than two members of a group are not getting along. Conflict may include ethnic, religious or gender prejudice, perceived or real injustices and various personality differences.	**Intergroup (between groups)** Example: Different departments or teams may not agree or support decisions from the other group leading to conflict.

Task: Examples of conflict

List examples of each of these types of conflicts based on past or current experiences. Talk about them in small groups.

Conflict in the workplace

Conflict in the workplace is complex and can be hard to deal with. People often connect conflict to anger but there are many conflicts that occur that do not involve anger. Conflict leads people to either take part in the conflict or to shut down and not participate. Our body is designed to respond in two different ways to conflict.

Fight or flight – the instinctive physiological response to a threatening situation that readies one either to resist forcibly or to run away.

In response to acute stress, the body's sympathetic nervous system is activated due to the sudden release of hormones. The sympathetic nervous systems stimulates the adrenal glands triggering the release of catecholamines, which include adrenaline and noradrenaline. This results in an increase in heart rate, blood pressure and breathing rate. After the threat is gone, it takes between 20 to 60 minutes for the body to return to its pre-arousal levels. The following diagram shows what is referred to as the arousal cycle.

Anger arousal cycle

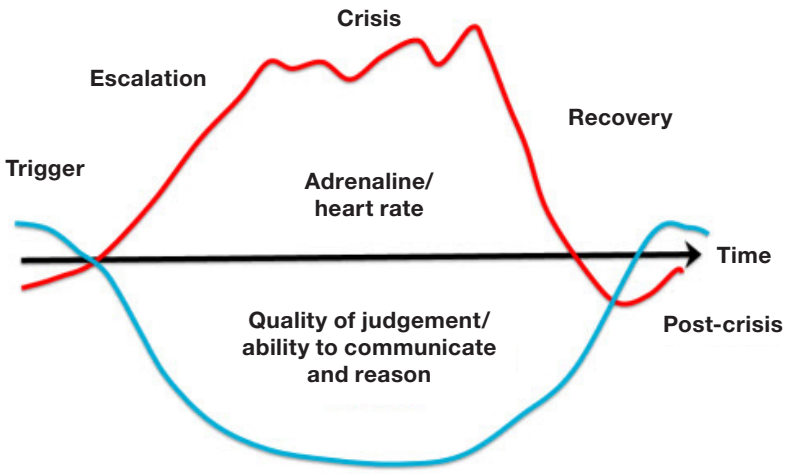


Image based on Harper, G. (2004). *The joy of conflict resolution: Transforming victims, villains and heroes in the workplace and at home.* Gabriola Island, BC: New Society Publishers.

It is important to know about this fight or flight response for your own personal knowledge and for the benefit of the team you work with. If members of your team are triggered, it becomes very hard to make decisions or get things done for the project. Below you will see some of the most common trigger areas for people.

> Every person you fight with has many other people in his life with whom he gets along quite well. You cannot look at a person who seems difficult to you without also looking at yourself.
>
> Dr. Jeffrey Kottler

Are they triggers or hooks?

There is a debate in the realm of conflict resolution as to whether these should be called triggers or hooks. The initial literature called them triggers, but for some this created an image of combat and weapons so there has been a shift to calling them hooks. This creates an image of you being snared into something. It's important to note that not everyone has the same hook. In order to deal with conflict in the workplace (or anywhere) it's important to figure out what your own hooks are. These hooks are related to a perceived threat. When you know your own hooks you are less likely to end up in conflict. There are many different models that outline triggers and hooks but the following chart[5] is based on the work of Dr. Stella Ting Toomey.

Competence – you're hooked when you perceive that someone is questioning your intelligence or skills.
Inclusion – you're hooked when someone appears to be excluding you in some way (from a group, an event, a committee, etc.) or implies you're not a good companion.
Autonomy – you're hooked when someone appears to be trying to control you, imposing on you, or threatening your self-reliance.
Status – you're hooked when you perceive that someone is threatening or dissing your tangible and intangible assets, including power, position, economic worth, and attractiveness.
Reliability – you're hooked when you perceive that someone is questioning your trustworthiness or dependability.
Morality – you're hooked when someone appears to be questioning your moral values or integrity.

[5] Ting-Toomey, Stella, "Managing Communication Effectively", Sage Press, California, 2001.

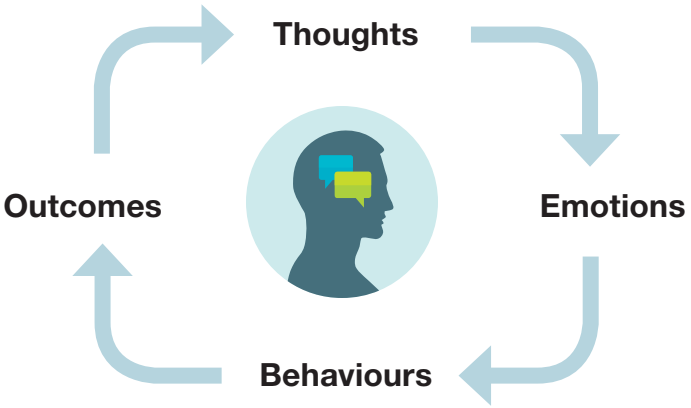
Topic: Self talk

The final part in looking at conflict in the workplace involves looking at our own self talk. There are many different estimates of the number of thoughts we have per day. The National Science Foundation cites it as being approximately 12,000 to 50,000 thoughts per day. Regardless of number, the important factor to look at is that of those thoughts, 80% are negative to self and others.

These thoughts were categorized by one of the leading specialists in conflict resolution, Stacey Holloway, as follows:

- Self-righteous – I knew this would happen, she thinks she…
- Judgemental – that's stupid, can't do anything right…
- Blaming – it's always my fault, I can't do anything right
- Frightened kid – I'm scared, I'm going to lose my job, how will I take care of my kids
- Victim/martyr – why does this always happen to me, I try so hard, it's not fair
- Self-deprecating – I'm stupid, I always get it wrong

How do these thoughts then affect our communications? If we look at the image below and imagine our thoughts being negative, what then happens to our emotions, our behaviours and the outcomes? What happens if we switch our thoughts to positive?



Task: Changing our self talk

Negative self talk	Positive spin
I've never done it before.	
It's too complicated.	
There's not enough time.	
There's no way it will ever work.	
We've tried that before.	
No one tells me anything	
I'm never going to get any better at this.	

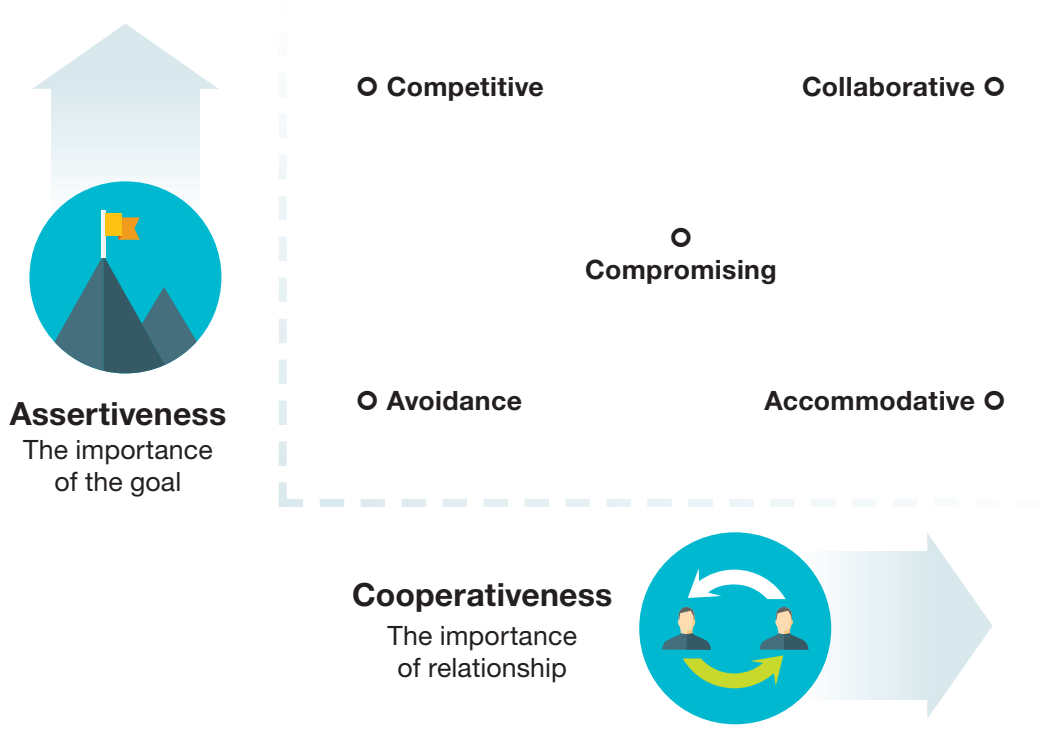
Topic: Styles of dealing with conflict

Conflict is a normal part of life including at the workplace. Conflict is often an indicator that the perspective that you have may not match the perspective of the person you are in conflict with. We have looked at some of the factors or triggers that may lead to conflict if you work on a multicultural team.

Below is a list of the five approaches that are common when people are faced with a conflict. Take a look at the list and see if you recognize yourself in an approach.

Conflict style	Behaviours
Avoid	A person avoids the conflict implying that they do not care about the other person or the issue.
Accommodate	A person backs down in conflict implying that they value the relationship more than the issue.
Compete	A person aggressively argues their position implying that the issue is more important than the relationship.
Compromise	A person gives a little in hope of gaining a little implying that they value cooperation.
Collaborate	A person tries hard to find a positive outcome for both people implying that both the relationship and issue are important.

The diagram[6] below shows how these conflict styles connect to assertiveness and cooperativeness.



[6] www.ccsc-cssge.ca/hr-resource-centre/hr-toolkit/workplaces-work/conflict-work

Task: Your conflict style

1. Think about yourself in a few different conflict situations. Is there a difference in your style when the conflict is at home versus at work? What is the difference?
2. With a partner, discuss these different conflict styles. How would different styles affect conflict in the workplace? Do you think there is a cultural connection to your dominant style? Why is it important to understand the different styles of conflict?

Workplace scenario: Precision Cabinets

Let's continue to look at the problem at Precision Cabinets. As with most projects there are changes as new information becomes available and the project progresses. Below is what has happened since the last time we looked at the problem.

- The machine shop cannot fix the safety latch on the lathe, so you see if the manufacturer can fix it. They can, but it will take two weeks for someone to come to the plant and it will cost at least $2,200.
- The machine shop is happy to build the platform for the lathe at a cost of $5,000. Although they thought they could do it immediately, they cannot start it for three weeks.
- A member of your team has a brother that is a machinist and his shop has time now to do the retrofitting of the self-venting bag. This will cost you $6,000 and they can do it immediately. It will take 2.5 weeks to complete. You will have to have the old lathe moved to their location at a cost of $750.
- The new safety procedures will require that everyone who uses the lathe be retrained. Each employee will need to spend 1.5 hours in training before they can use the lathe safely. This training will cost $1000.
- A massive custom order came in that needs to be completed on the old lathe. The job can be started and it would ideally require the use of the old lathe in 5 or 6 weeks. The people in sales really want to accept this order because they feel that if the customer is satisfied, more business will follow.
- Availability of a forklift is hit or miss so you changed the specifications of the platform you initially planned to make the old lathe movable with a hand dolly.

Task: Put the skills to work

Complete the following tasks in pairs then compare your decisions with another pair.

Develop a basic budget for the project. Are there additional costs not listed above that need to be considered to be able to make a decision?
Develop a timeline for the project.
Work out a schedule for the tasks that need to be done.
What additional information would you like to have? Who would be the best person to get this information from?

Key definitions

Cooperativeness – working or acting together willingly for a common purpose or benefit.

Accommodate – willing to help or please

Avoidance – the act of keeping away from, or to prevent from happening

Compromise – an agreement reached between conflicting ideas, where each person modifies and finds middle ground

Collaborative – willing to work together, usually willingly, and cooperate

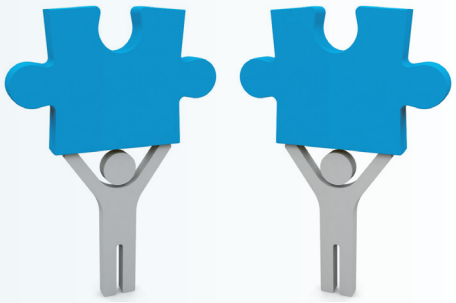
Competitive – working to win something or to be the best

Assertiveness – sure of oneself, positive, confident

Linear – moving from one stage to another

Perspective – one's own ideas and way of seeing things; the facts and ideas one knows (may be different from another person's perspective)

Workplace Essential Skill building: **Oral Communication**



Topic: What is active listening?

Focus questions

- **How is hearing different than listening?**
- **When you want to show someone you are listening to them, what do you do?**
- **Can you think of a situation where someone's body language did not match what they were saying? How did that make you feel?**
- **How can you politely ask for clarification when you do not understand what someone has just said?**

Active listening

Active listening is an essential skill for anyone in contact with people. Active listening means exactly what the name suggests – actively listening or concentrating on what is being said rather than just sitting back and "hearing" the speaker or thinking about how you are going to respond. Listening is an active process in which a **conscious** decision (fully aware of something) decision is made to listen to and understand what the speaker is saying.

- Actively listening to what another person is saying means you are focusing on that person, rather than on your response. It also means that you need to keep your mind open to listening from their **point of view** (attitude or way of thinking), not your own. Even when good listeners have strong views, they **suspend judgment** (withhold judgment until more information is known), hold their criticism and avoid arguing or selling their point right away.
- Patience is also a very important part of listening. Pauses and short periods of silence are fine. Listeners should not be tempted to jump in with questions or comments every time there are a few seconds of silence. Active listening involves giving the other person time to explore their thoughts and feelings.
- Active listening involves listening with all senses. As well as giving full attention to the speaker, it is important that the listener is also "seen" to be listening – otherwise the speaker may think that what they are talking about is uninteresting to the listener.

- To demonstrate that you are listening, use both verbal and non-verbal messages such as those listed below. By providing this "feedback", the person speaking will usually feel more at ease and therefore communicate more easily, openly and honestly.

Non-verbal signs of active listening

Smiling – used to show that the listener is paying attention to what is being said or as a way of agreeing or being happy about the messages being received. Smiling is often used with a nod of the head.

Eye contact – it is normal and usually encouraging for the listener to look at the speaker. Combine eye contact with smiles and other non-verbal messages to encourage the speaker.

Posture – the position of a person's body can tell a lot about the speaker and the listener. The **attentive** listener (one who pays close attention) tends to lean slightly forward or sideways while sitting. Other signs of active listening may include a slight lean of the head or resting the head on one hand.

Mirroring – automatic reflection/mirroring of any facial expressions used by the speaker can be a sign of attentive listening. These reflective expressions can help to show sympathy and empathy in more emotional situations.

Avoiding distractions – active listeners pay full attention to the speaker. They avoid the urge to move around, doodle or check their phone.

Verbal signs of active listening

Positive reinforcement – verbal messages such as "yes", "I agree" or "indeed" show that the listener is paying attention. Although some positive words of encouragement may be beneficial to the speaker, the listener should avoid using them too often as they can distract from what is being said.

Remembering – remembering a few key points, or even the name of the speaker, can help to reinforce that the messages sent have been received and understood. Taking notes is a good strategy to use during meetings.

Questioning – the listener can demonstrate that they have been paying attention by asking relevant questions and/or making statements that build on or help clarify what the speaker has said.

Reflective listening – this is a way to make sure that you and the speaker understand each other. The active listener will repeat back the key points the other person made, to show they understood what was said and felt. Reflective listening includes:

- Listening for the basic message
- Listening for the feeling behind the message
- Restating what you have been told in simple terms
- Not questioning the speaker unnecessarily
- Not adding to the speaker's meaning
- Not taking the speaker's topic in a new direction

Asking for clarification – ask questions of the speaker to make sure you understand the meaning. The purpose of clarification is to:

- Ensure that the listener's understanding of what the speaker has said is correct
- Reassure the speaker that the listener is interested in them and is attempting to understand what they are saying. For example:

  Speaker: "I just don't understand my boss. One minute he says one thing and the next minute he says the opposite."

  Reflective listener: "You feel very confused by him?"

  Non-reflective listener: "So you're saying he's the worst boss you've ever had? I've had a lot of awful bosses too! This one time…"

Asking questions – asking the right question at the right time can be critical and comes with practice. The best questions are open-ended as they give the speaker choice in how to respond, whereas closed questions allow only very limited responses.

- **Open questions** – the most effective questions start with "when", "where", "how" or "why". These questions encourage speakers to be open and expand on their thoughts. For example:

  "When did you first start feeling like this?"

  "Why do we do it this way?"

- **Closed questions** – usually require a "yes" or "no" response and do not encourage speakers to be open and expand on their thoughts. Such questions often begin with "did you?" or "were you?" For example:

  "Did you always feel like this?"

  "Were you aware of the problem with the prototype?"

Task: Listener responses

Complete the chart with appropriate and inappropriate listener responses for the situations given. Use your own current or prior workplace situations for numbers five and six. Try to include actual situations you have encountered, if possible. Be prepared to discuss and explain these in class.

	Listener	
Speaker	**Non-verbal communication**	**Posture**
1. Boss: "We need to discuss the out-of-control budget on the Tallman Project".	**Appropriate**	
	Nod of head	Sit up straight in chair
	Inappropriate	
	Yawn	Puts feet up on desk
2. Project manager: "…and thank you all for listening to my presentation."	**Appropriate**	
	Clapping	Stand up
	Inappropriate	
	Frown	Cross your arms
3. Team member: "Excuse me Susan (the project manager), can I talk to you about something?"	**Appropriate**	
	Inappropriate	

4. Boss: "John, meet the stakeholders for our newest project. They have just flown in from California."	**Appropriate**	
	Inappropriate	
5.	**Appropriate:**	
	Inappropriate:	
6.	**Appropriate:**	
	Inappropriate:	

Task: Clarifying and confirming information during a meeting

Read the following conversation from a Precision Cabinets meeting where they are discussing the recent developments regarding the lathe problem. Several participants are asking the speaker to clarify some points he has made.

Joshua: "I believe that our best decision would be to have the lathe manufacturer repair the safety latch for us."

Noor: "Joshua, **returning for a second to what you just said** about that delaying our timeline, **could you clarify that for us**?"

Joshua: "Of course. If we go with the manufacturer, it will only take two weeks."

Noor: "Okay, **correct me if I'm mistaken**, but do you mean that we will be two weeks over our project timeline then?"

Joshua: "That's not quite what I meant. It won't affect our final timeline most likely, because other parts of the project will take place while we are waiting for the manufacturer. **Does that clarify things**?"

Noor: "More or less."

Brett: "I'm sorry Joshua, but **could you say that again**?"

Joshua: "No problem! We do have to wait two weeks for the manufacturer to come to our plant to do the safety latch repair but in those two weeks we will move forward with other parts of the project such as the self-venting bag as well as the retraining that will have to be done for the new lathe."

Mel: "I think I misunderstood you, Joshua, but isn't the self-venting bag being retrofitted at another machine shop?"

Joshua: "Correct, but **what I meant** was that we have to get the lathe over to that shop to get the self-venting bag installed."

Mel: "I don't really like this idea. **What exactly do you mean** when you say 'get the lathe over there'? It's a huge machine! Won't that be expensive?"

Joshua: "It will cost $750.00 to get the lathe over to the other machine shop but most of that expense is due to the large forklift we have rented which will be able to lift the lathe onto one of our trucks. So, **in a nutshell**, the lathe will be moved to the machine shop and have the self-venting bag installed, and when that is completed it will be moved back here and have the safety latch replaced, adding no extra time to our final deadline."

Match the phrases from the conversation to the description that fits.
Use each phrase only once.

1. A phrase used by a person to check if they have correctly understood what was said is		**returning for a second to what you just said**
2. A phrase used to ask a person if they now understand what was said is		**could you clarify that for us?**
3. A phrase used to refer back to an earlier part of the conversation is		**correct me if I'm mistaken**
4. A polite phrase where the person seems confused or surprised by what they heard is		**That's not quite what I meant**
5. A direct way to tell someone that they haven't understood what you said is		**Does that clarify things?**
6. A phrase that asks someone to repeat what they said is		**could you say that again?**
7. A direct phrase which asks a person for clarification on a specific point they just made is		**I think I misunderstood you**
8. A polite way to tell someone that they haven't understood what you said is		**what I meant**
9. A phrase which means I am going to repeat something in the fewest possible words is		**What exactly do you mean?**
10. A polite phrase which asks someone for clarification on a point is		**in a nutshell**

Key definitions

Active listening – concentrating on what is being said

Attentive – paying close attention to something

Conscious – fully aware of something

Point of view – a particular attitude or way of thinking

Suspend judgment – withhold judgment until more information is known

Workplace Essential Skill building: **Writing**

Topic: What is project performance reporting?

Focus questions

- **Have you ever written or read a project performance report?**
- **What information do performance reports include?**
- **What are the benefits of a performance report written by the project manager and provided regularly to all stakeholders?**

In Modules 1 and 2 we learned about the four steps involved in project communications:

1. Communication planning
2. Information distribution
3. Performance reporting
4. Project closure

In Module 1 we focused on step one, communication planning, which included creating a communication management plan. We also looked at step two, information distribution, in the form of a memo in Module 1 and in the form of an email in Module 2. We will now learn about step three.

Performance reporting

Project managers must monitor and control projects to ensure completion while staying within budget and on time. Project performance reporting is one of the tasks they complete that help them to do this.

A **performance report** is an important part of project communication. These reports can also be called status reports, progress reports or interim reports, but all have the same purpose and follow a similar structure. A project performance report is a regular, structured report on project progress comparing it to the original project plan. Its purpose is to effectively and

efficiently communicate project performance at regular times throughout the project to project stakeholders. Good, consistent, project performance reporting helps to avoid unexpected surprises to management, project sponsors and other stakeholders.

Keeping people updated by using performance reporting ensures they remain involved and committed to the project. Regular communication is essential to the well-being of any project.

Watch for these roadblocks to performance reporting:

- Poor communication between people involved in the project
- Lack of honest communication
- Unwillingness to communicate bad news
- Not asking for help when it's needed

Objectives of effective reporting include:

- To improve communication of information within the project and across the organization
- To simplify the process of gathering and understanding project information
- To ensure that stakeholders receive necessary information to stay informed and actively involved
- To communicate key messages about project progress
- To improve organizational support for the project

Project performance reports keep project stakeholders informed of project health such as schedule, issues, scope, cost, and **resources** (supplies given for support, such as more money, more workers, or more materials). They also allow management to make informed decisions regarding the current direction of the project including: responding to bottlenecks, where to make trade-offs, revision of goals, or where to add more resources.

Project reports can also be used to provide a documented history of the project. This can then be used to evaluate, review, and learn from how the project succeeded and where it may have had difficulties.

How to structure performance reports

- Keep the report brief, usually within two pages.
- The report should have a standard **format** (the way in which something is arranged or laid out). Every status report for each reporting period should be consistent in format and details with the previous report.
- Write in bullets, not in paragraphs.
- Use action words like completed, improved, fixed and corrected.

- Be concise. Do your best to shorten all expressions and sentences.
- Avoid adverbs (really, very, much) and avoid adjectives (good, bad, ugly).
- Edit for spelling, grammar and punctuation.

Information to include

- The name of the project, the date covered by this report, and manager
- What's happened in this reporting period
- What's coming up in the next reporting period, key future dates
- Key project milestones. The project has major accomplishments which must be completed by specific dates.
  - Date it was to be completed
  - Actual date of completion or estimated completion date
- Project schedule showing planned schedule vs. current state
  - The % completed of the overall project
  - The % completed of the various phases of the project
  - Projected completion dates
- Budget showing planned vs. actual costs (could be a chart or graph)
- The top three issues, potential problems and changes
  - Describe the issue, problem and/or change in your report
  - When it happened
  - Seriousness of the problem – If the problem is stopping the project from moving forward and is affecting the delivery date, it is a blocking issue and is very important. If the problem is something minor that will be fixed quickly, it is not as important.
  - Name of person dealing with it
  - What is currently being done to fix it
  - Estimated date it will be fixed

Sample report

After one month of building, Steve from SRS Construction writes a project performance report to send to his two business partners as well as to his lead plumber, electrician and carpenter. He will continue to do this each month of the project for Mr. and Mrs. Gray's home.

Month 1:
Progress Report for 18 Leveque Way, Spruce Woods (Mr. and Mrs. Gray)

September 1-30, 2015; Steve, Project Manager

This month's progress:

- Sept. 1-3 Site excavation
- Sept. 4-8 Foundation
- Sept. 8-28 Framing

Next month's schedule:

- Roofing
- Windows and doors
- Exterior finishing (siding and stone)

Milestones:

- Sept. 9 Foundation Inspection completed
- Sept. 26 LandTech Developers approved exterior finishes and colours

Design/Build: 18% completed overall

	Date or % completed			Date
Build	**Planned**	**Actual**	**Build**	**Planned**
Site	Sept. 3	Sept. 3	HVAC	Nov. 12
Foundation	Sept. 10	Sept. 8	Electrical	Nov. 30
Framing	Sept. 30	Sept. 28	Insulation	Dec. 15
Roofing	Oct. 10	10%	Drywall	Jan. 1
Exterior finishing	Oct. 31	0%	Interior Finishing	Feb. 15
Plumbing	Nov. 10	0%	Landscaping	April 15

Budget			
Item	**Estimated cost**	**Actual cost**	**Over + or under-**
1. Architect/design fee	$3200	$3200	0
2. Site survey	$500	$500	0
3. Permits			
A) Building	$1000	$1000	0
B) Water	$350	$350	0
C) Septic, electrical, plumbing	$2200	$3000	+$800
d) HVAC	$100	$150	+$50
4. Excavation	$3500	$3500	0
5. Hauling	$400	$500	+$100
6. Framing labour and lumber	$23,000	$22,300	-$700
7. Framing hardware, adhesives	$1800	$1500	-$300
…continued			

Issues/concerns

HVAC permit delayed because of paperwork issue. Chandra will file the proper paperwork tomorrow to resolve the issue.

Key definitions

Format – the way in which something is arranged or laid out

Project performance report – a regular, formalized report on project progress as compared to the project plan. May also be called status reports, progress reports or interim reports.

Resources – supplies given for support, such as more money, more workers, or more materials

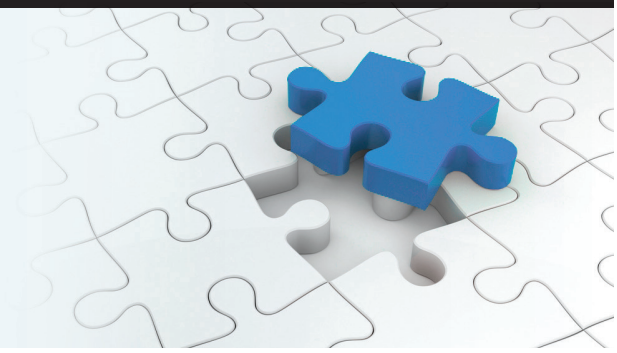
In-Class Module 4

Monitoring and Project Closure

In-Class Module 4: Monitoring and Project Closure

Contents

Project management **content knowledge**



Outcomes

- Understand what must be done to close a project
- Understand the factors that define project success
- Know how to structure a presentation
- Know what sections to include when writing a final project report

Making connections

1. On the discussion board you were asked to discuss any issues you could foresee coming up in the monitoring and controlling phase of the project. Discuss these issues in a small group and include any examples you thought of as you were doing the assignment.
2. Think about and discuss how project monitoring and controlling prepares you for the last project phase: project closure.
3. What do you think are the things that need to happen in the project closure phase?

Topic: What is involved in closing a project?

Focus questions

Briefly think about the following questions before you start to read:

- **What is the purpose of a final report if there are already several performance reports written throughout the project?**
- **What information could you include in a final report that would help with future projects?**

Recall that in Modules 1, 2 and 3 we learned about the four steps involved in project communications:

1. Communication planning
2. Information distribution
3. Performance reporting
4. Project closure

In this module we will focus on writing the final report which is a part of closing the project.

Project closure

As discussed previously in this module, project closure consists of several steps, one of which is the development of a final report. The project final report is intended to concisely summarize the outcomes of a project. It should reflect the formal and informal feedback collected from team members, project stakeholders and participants throughout the project. Let's look at why this final piece is needed.

Objectives of an effective final report are:

1. To provide a documented history of the project
2. To give a final evaluation of the project
3. To allow senior management to assess the success of the project
4. To identify **best practices** (best way to do something) for future projects
5. To resolve any outstanding issues
6. To formally close the project

The final report for a small project may be no more than two pages while the report for a large project may be 10 or 20 pages in length. If relevant information has been gathered and documented throughout the project, producing the final report should be relatively easy.

All team members should either contribute to the report or review its contents for accuracy before it is finalized. Often, the project manager will have others write and submit their relevant portions of the final report and then, after editing, add their own comments before including it into the report.

How to structure final reports

1. It should have a consistent look with the performance reports.
2. It is important to match the tone, length and level of formality of the report to the audience who will be reading it.
3. It should have clearly identified sections with headings for easier navigation.

4. It should be written in complete sentences. Use bullet form or charts and graphs where appropriate.
5. It must be edited for spelling, grammar and punctuation.
6. If necessary, it should include an **appendix** (a separate section of additional material at the end of a document, such as the final budget, the evaluation and performance reports).

What information to include

Earlier in this module you were given an example of a final report. Below is a list of 10 items that were included. These are the things that must be included in a final report. You may want to compare this list with that example report as a reference.

1. **Project nam**e – name given to the project at its start.
2. **Project manager** – person running the project.
3. **Team members** – the names of all team members and their roles or responsibilities.
4. **Author(s)** – name(s) of those writing the report.
5. **Description/executive summary** – this should give the readers a concise overview of the project purpose, findings, progress, issues and recommendations. Readers can use the executive summary to decide whether they must read the entire report. It can be one paragraph long or several pages, depending on the report, and it is located at the start of the report.
6. **Introduction/project background overview** – explain the nature of the project, list original goals, objectives and success **criteria**.
7. **Project successes** – list and describe the highlights and key success factors of the project.
8. **Unexpected events** – list and describe any unexpected events that occurred during the project, including approved change requests, the impact that those events may have had on the project and the action(s) taken to address them.
9. **Lessons learned** – list and describe any lessons learned from this project and provide recommendations that can be used to improve the delivery of future projects.
10. **Project performance** – provide details on the performance of the project with a focus on time, budget and meeting customer expectations. Each project will have different definitions for what “on time, on budget and meeting customer expectations” means.

Task: Reviewing a project final report

The project manager's report should provide a detailed overview of the project, outlining the original plan including the names of the team members and their responsibilities. The report must include any **deviations** (differences) from the original plan and the reasons for them.

Look over the project final report provided below. Working in small groups, identify which elements of the report you found beneficial. Is there anything you would like to change about the structure of this report?

Project Final Report

DOCUMENT INFORMATION			
Project name:	18 Leveque Way, Spruce Woods, AB.	**Clients:**	Mr. and Mrs. Gray
Project manager:	Steve Smith, journeyman carpenter	**Build date:**	September 1, 2015
Crew:	Shawn Maas, plumber Dana Majumder, electrician Shannon Lui, carpenter	**Prepared by:**	Steve Smith

Executive Summary

The featured project is a house at 18 Leveque Way in Spruce Woods, Alberta. It is a 2400 square foot bungalow know as the "Thom Hurst" design. It was designed by Advantus Architecture for Mr. and Mrs. Gray (see Appendix A for blueprints).

Designs for this home were finalized in May of 2015. The contract between RSR Construction and Mr. and Mrs. Gray was signed on July 26, 2015. The sale of the lot (18 Leveque Way) took place on August 5, 2015, between RSR Construction and the land developer. Final approval of the design by the developer occurred on August 15, 2015.

The goal was to begin construction on September 1, 2015, and complete the build and landscaping by April 30, 2016. The landscaping was actually completed on May 30, 2016. The home was built within the set goal of 10% over budget (refer to Project Performance section for a complete budget). The customers were very involved in the entire build and were very satisfied with the end results (refer to the Project Performance section for the Customer Satisfaction Survey results).

Other than minor weather and permit delays, most of the issues came from Mr. and Mrs. Gray changing finishes as well as design plans. This was mainly due to their hiring of a designer in the last two months of the build as well as a landscape designer. This affected the timeline more

than the budget, but was an ongoing issue that should have been discussed before the build. Having the finishing carpenter work directly with the designer seemed to eliminate most of the issues that were occurring. As well, having the landscapers work directly with the landscape designer helped to alleviate issues and move the process along.

Project Background Overview

Mr. and Mrs. Gray hired RSR Construction in July of 2015 with the desire to have a large bungalow built on a walk-out lot in the town of Spruce Woods. RSR Construction was charged with the task of securing a walk-out lot large enough to accommodate the design of their home (Advantus Architecture) and within their budget of $125,000. Unfortunately, all walk-out lots in the town of Spruce Woods were purchased. SRS Construction then found a lot in a rural area of Spruce Woods in a new development, but it was not a walk-out. This lot (18 Leveque Way) was purchased in August by RSR Construction from the developer, Century Land Inc., for $99,000.

Changes were then made to the design of the home by the architect, to accommodate the new lot. The design was approved by Century Land Inc. in mid-August and construction began on September 1, 2015.

Project's Major Activities and Milestones

Main activity	**Planned time** (days)	**Actual time** (days)	**Time variance** (days)	**Major reason for deviation**
Site	3	3	0	
Foundation	7	5	-2	
Framing	22	20	-2	
Roofing	10	6	-4	Larger crew
Exterior Finishing	21	32	+11	Weather
Plumbing	30	40	+10	Missing crew member due to illness
HVAC	2	4	+2	Permit issues
Electrical	20	22	+2	Permit delay, change to design plan in lower level
Insulation	15	10	-5	Larger crew
Drywall	15	15	0	
Interior Finishing	45	48	+3	Tile back-ordered, changes made by homeowners
Landscaping	14	29	+15	Owner changed design plans
Totals	204	234	+30	

Project Change Requests

The following changes impacted the original goals:

Item #	Description	Date submitted	Date approved
1.	brick on exterior increase by 15% (as per the developer's request)	September 15, 2015	September 17, 2015
2.	Re-route HVAC to receive permit	November 12, 2015	November 14, 2015
3.	Change to lighting requirements in lower level	November 17, 2015	November 19, 2015
	…continued		

Lessons Learned

Within this project we learned that late stage design changes affect timelines. For future projects we will:

- Have all design consultations done within stage one of the build, before the drywall.
- Have homeowners sign off on all designs so that there will be no changes after this date.
- Offer homeowners the opportunity to meet with and choose a designer before the build has begun.
- Have the designer work directly with the finishing carpenter and other trades as necessary.
- Offer homeowners the opportunity to meet with and choose a landscape designer before the build has begun.
- Have the landscape designer work directly with the landscaper.

Project Performance

The performance of the overall project will be judged on three factors:

Time – The overall timeline was extended by 30 days. The customers were still satisfied with the possession date and understood that the delays were not the fault of the builder. (Refer to Project's Major Activities and Milestones section for more details.)

Budget

Item	Estimated cost	Actual cost	Over (+) or under (-)
1. Architect/design fee	$3200	$3200	0
2. Site survey	$500	$500	0
3. Permits			
a) Building	$1000	$1000	0
b) Water	$350	$350	0
c) Septic, electrical, plumbing	$2200	$3000	+$800
d) HVAC	$100	$150	+$50
4. Excavation	$3500	$3500	0
5. Hauling	$400	$500	+$100
6. Framing labour and lumber	$23,000	$22,300	-$700
7. Framing hardware/adhesives	$1800	$1500	-$300
…continued			

Customer expectations

Customer Expectation Survey – Mr. and Mrs. Gray, 18 Leveque Way				
Please read the following statements and check off the appropriate box.	1 (not at all)	2	3	4
I was satisfied with the pre-build meetings with RSR Construction.				√
The project manager was easy to communicate with.			√	
I felt involved in the design process.				√

Workplace Scenario: Precision Cabinets

The project is complete. Even though there were setbacks and issues, you consider the project to have been successful. Roger is satisfied with the outcome. The lathe's safety latch is fixed, all members of the manufacturing team that have to use it are trained, and the movable platform is easy to maneuver. All the details were done on time to complete the customer's special order. Below is a summary of the project.

Brainstorm	Four meetings were held with project team members. Project took two weeks to organize.
Research external and internal solutions	Took two weeks to gather the information.
Create the project team	Planned for two weeks but only took 1.5. Overall, the other company employees were very supportive. We had one team member go on sick leave right after the start of the project. We chose not to replace that person and we continued the project with the team we had.
Complete a task list and schedule	Three days planned and completed in this time. Entire team involved and committed to the timeline.
Prepare the budget	Budget was set in one week by the project manager and one financial team member.
Make the venting bag internally	The first try at the venting bag was unsuccessful. The internal machine shop made the sawdust bag too small so it had to be redesigned and manufactured again. It took two extra weeks but the end result was perfect.
Make the movable base	The base took one week longer to make than planned because we changed the design to allow the lathe to be moved by a hand dolly rather than by a forklift.

Train the workers on properly moving and using the lathe and venting bag	Took one week to train all 15 workers on how to properly move the lathe and use the venting bag properly.
Complete the project	Made sure that the people that use the redesigned old lathe were satisfied.

Task: Collecting and organizing information for the project final report

Roger wants a report detailing the lathe project. In small groups, discuss what information needs to go into the report. Be sure to include an appropriate level of detail including an overview of the project, the original plan including the names of the team members and their respective responsibilities. Also include any **discrepancies** and the reasons. Be sure to include the project's successes and failures. Look at the final report example given earlier as an example. You may need to review the workplace scenarios in the previous modules to make sure you have all the information you need. Take notes as you go to prepare for your final writing activity.

Notes

Key definitions

Appendix – a separate section of additional material at the end of a document

Best practices – a method or way of doing something that has shown results that are much better than those achieved by other methods. It is the best way to do something

Criteria – standard by which something is judged

Deviations – differences

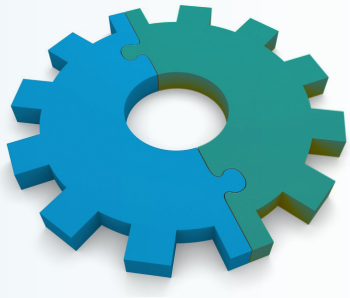
Discrepancies – a disagreement or a variation between two things such as between the projected budget for a project and the actual budget

Management control – setting standards, measuring actual performance and taking corrective action

Post-project evaluation – the evaluation that occurs at the end of the project

Project audit – an official examination of the project

Intercultural **knowledge building**



Topic: Workplace relationships – when cultures collide

Focus questions

Briefly think about the following questions before you start to read:

- **What are some cultural differences that you are aware of in the workplace?**
- **How will being aware of cultural differences help you manage a successful project?**

Cultural differences among team members

The workplace is filled with individuals who represent different cultures. Some are newly arrived and some have been in Canada for generations. As we have learned before, culture is the sum of attitudes, customs, and beliefs that distinguishes one group of people from another.

As a project manager or team member it is important to be aware of the potential differences on the team. This understanding is what allows you to respond positively as opposed to just reacting to what is happening around you.

As we also learned in the previous module, when people from different cultures come together they bring different approaches. Paul Holmes developed a resource that provides 28 articles that will make a newcomers transition in to the Canadian workplace easier.

The following is a list of tips that comes from his resource entitled *Workplace Integration – Desk Reference for Newcomers to Canada.*[1]

[1] Holmes, Paul, "Workplace Integration – Desk Reference for Newcomers to Canada", Anthony & Holmes Consulting, 2013.

The 28 Articles for Workplace Integration

The first day

- Have a game plan to adapt.
- Use a notebook.
- Understand how credibility is built.
- Ask when you don't know.
- Be aware of non-verbals.

The first week

- Culture hides. Find it.
- Avoid knee-jerk reactions.
- Adapt to how power works.
- Stay on your organizations clock.
- Know these things because no one else is going to tell you.
- Use only English.
- Avoid the perfect grammar trap.
- Use initiative.
- Bring up problems as soon as possible.
- Learn from your mistakes.

The first month

- Deal with co-worker mistakes in the Canadian way.
- Use a Canadian communication style.
- Use intercultural communication.
- Be prepared for meetings.
- Speak up. Contribute. Participate.
- Maximize your day of small beginnings.

The first year

- Use an evolving set of career expectations.
- Seek feedback.
- Master English.
- Clear your pronunciation.
- Become really good at working with difference.
- Integrate. Don't isolate.
- Stay positive.

Task: Cultural communication tips

Working in pairs you will be assigned one or more of the tips from the list above. In your copy of *Workplace Integration – Desk Reference for Newcomers to Canada,* read through the article you have been assigned. You will then be asked to present your assigned tip to the group. You will:

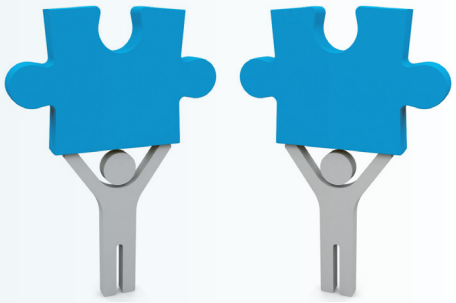
1. Describe the tip in your own words.
2. Describe how you think it relates to your participation in a workplace.

Notes

Key definition

Knee-jerk reaction – a quick reaction that does not allow you time to consider something carefully

Workplace Essential Skill building: **Oral Communication**



Topic: What makes a good presentation?

Focus questions

Briefly think about the following question before you start to read:

- **Thinking about the presentations you have attended:**
  - **What makes a good presentation?**
  - **What makes a bad presentation?**
- **How can you improve your own presentation skills?**

Why do I need good presentation skills?

The ability to communicate comfortably with people at all levels of an organization about the project is one of the most important skills project managers can have. Excellent communication is the key to successful project management. Project managers may be asked to present information during the launch of a project, to report the status of the project to team members, or to pitch to clients and stakeholders. Both informal and formal presentation skills will be required for these different audiences and situations.

Things to consider when delivering an effective presentation

Purpose – Why are you giving your presentation? Is the presentation meant to inform the audience, persuade them, or entertain them?

Audience – Who are you speaking to? This will help you to determine what your audience needs to know, it will help you shape the language used (formal or informal style), and how the ideas are presented. Think about what will get the audience interested right from the beginning.

Delivery format – How will you present the information? Do you have visuals (charts, posters, PowerPoint), handouts, or technology needs? An audience remembers 40% more when they see and hear information at the same time. Make it easy for the audience to understand your message.

Research, then write – Gather the information for the presentation before you begin to put it all together. You may start with the body of the presentation and then write the introduction and conclusion.

Style – How will you deliver the presentation? Your personality is going to shine through your presentation no matter what, but it's important to keep in mind the three qualities of a great speech:

- **Clear** – avoid "ums" and jargon.
- **Concise** (brief but comprehensive) – anything that doesn't support a main point should be cut from your overall presentation.
- **Concrete** (relating to an actual thing or situation) – make sure you provide your audience with action items and descriptive language that gives them a clear picture of the information. For example, instead of saying "I need you to be more reliable with your time cards," say, "I need your time cards to be emailed to me by 12 pm on Fridays." Here, the term "reliable" is replaced with a clear action item and deadline.

Practice – Make sure you know your speech well. You should have a speaking outline ready on note cards or one sheet of paper. This outline shouldn't be word-for-word, but it should give you enough of a **prompt** (hint) to keep you going through the speech.

Basic presentation outline

I. Introduction – introduce the presentation topic to the audience. Should be kept short, about 10% of the presentation time.

- **Attention getter:** an opening that catches the audiences interest like an interesting fact, quote, joke, question, story or audio or visual aid
- **Thesis statement:** one clear and concise sentence that gives the topic of the presentation
- **Preview:** list 2 to 5 main points in the order they will be presented in the body
- **Transition:** words or phrase that indicates when a presenter has finished one thought and is moving on to another

II. Body – all the facts, figures, examples and illustrations that support the topic. Should be the longest part, about 80% of the presentation time.

- **Main point 1:** the first main point that was listed in the preview sentence in the opening paragraph
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Transition (words or phrase that lead into the second main point)

- **Main point 2:** the second main point that was listed in the preview sentence in the opening paragraph
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Supporting details (facts, examples, statistics and details that support the main point)
  - Transition (words or phrase that lead into the third main point or to the conclusion)
- **Main points 3, 4, 5** (if needed)

III. Conclusion – reinforces the central idea which helps the audience take the main purpose of the presentation away with them. Should be short, about the same length as the introduction which was 10% of the presentation length.

- Restatement of the thesis IN DIFFERENT WORDS
- Summary of the main points of the presentation in one sentence
- Recommendations, future direction, next steps to take
- Final statement about the topic for audience to take away

Task: Parts of a presentation

Choose a partner. Together, go through the transcript of a 2-minute presentation and using a highlighter, **highlight** and **label** the different sections with the following information:

In the Introduction:

- Attention getter
- Thesis statement
- Preview
- Transition

In the Body:

- Main point 1
- Three supporting details
- Transition
- Main point 2
- Three supporting details
- Transition
- Main point 3
- Three supporting details
- Transition

In the Conclusion:

- Thesis statement
- Summary of main points
- Recommendations
- Final point

Transcript of a 2-minute presentation

I. Introduction

According to the Book of Lists, by David Wallechinsky and Irving and Amy Wallace, what I'm doing right now is the number one fear of people, surpassing the fear of snakes, flying and death. It is speaking in front of people! Good communication skills go beyond being able to give a presentation or hold a conversation; at work employees must know how to communicate well others, write reports and send emails. Today I'm going to talk about the benefits of effective communication in the workplace. I will focus on how these skills are the key to your success because they help with team building, increase employee morale and are the number one skills sought by employers. Keeping these three points in mind, let's look at our first point.

II. Body

Effective communication in the workplace helps employees and managers form highly efficient teams. Effective communication with co-workers and between work teams reduces unnecessary competition and helps employees work together harmoniously. The result is higher productivity, integrity and responsibility. It has also been discovered that employees who were graded as highest in production had received the most effective communication from their supervisors. Lastly, through good communication, employees know their roles on the team and know they are valued. A manager who openly communicates with the employees can foster positive relationships that benefit the company as a whole. Now that we know how communication benefits the team, let's look at its effects on employee morale.

An improvement in employee morale can result from effective communication. Although pay is a concern for many workers, it is not their only concern. Employees appreciate good communication coming from management. It produces a healthy work environment. When employees are satisfied with their jobs, they are able to efficiently perform their duties with a positive attitude. If bosses or managers are able to listen to employees and respond, this leads to an increase in employee job satisfaction. And don't we all want to be more satisfied with our jobs?! As employees it is our job to communicate effectively, but let's look at just how desirable these skills actually are.

Effective communication skills are what employers are looking for. A 2014 survey of nearly 600 employers found that what employers want most from new business hires are people who can speak well, write well, listen to others, present well, sell ideas to others, and negotiate with others in business. Some companies hire experts to train their employees on how to effectively communicate. Our communication skills are a part of the first impression we give people. And when we are representing our business or company, we want our professionalism and attention to detail to shine through. Finally, finding ways to develop and improve your communications skills is always a good idea. Remember, how well you communicate and present yourself will set you apart, both in an interview and later on as you advance in your career. Companies are in the business of building their future leaders; they need managers who possess not just technical skills but also the communication skills that will make them effective leaders. So, obviously, communication skills are essential to business success.

III. Conclusion

It is important to understand all of the benefits of effective communication. Employers know that strong communication among employees and with management strengthens teams, improves morale, and has become one of the most sought after skills by employers. Knowing this, you can see that one way for you to be successful in life is to increase your ability to speak and write effectively. Excellent communication is the key to unlocking your potential!

Thank you for your attention.

Example of a speaking outline

Below is an example of the presenter's speaking outline from the transcript of a 2-minute presentation. This outline was created by the presenter after they wrote their presentation; it will help them to stay on topic as they deliver the presentation. It is done in point form.

I. Introduction (EYE CONTACT, SMILE)

Public speaking #1 fear

Benefits of effective communication in the workplace

- form efficient teams
- improve employee morale
- most sought after skill by employers

II. Body (PAUSE, LOOK AT AUDIENCE)

Efficient teams

- reduces competition = increase productivity, integrity and responsibility
- study: highly productive employees received most communication
- know roles, valued, benefits entire co.

Employee morale

- good communication = healthy work environment
- employee more efficient and positive attitude
- manager/boss listen and respond = increased job satisfaction

What employers want

- 2014 survey 600 businesses – #1 communication skills (speak, write, listen, present, sell, negotiate)
- first impression
- ways to improve – set you apart

III. Conclusion (PAUSE, LOOK AT AUDIENCE)

- understand benefits of effective workplace communication
- strong teams
- good morale
- #1 most wanted skill – key to unlocking potential!!

(THANK AUDIENCE)

Task: Give a presentation

Prepare and give a presentation based on a project you would like to be manager for.

Choose a topic related to your current workplace or a workplace in your field of expertise.

Some possible topics might be:

- The first meeting of the new project.
- Some problems that are happening and some possible trade-offs that might need to be made.
- There is some tension on the team because of a cultural difference you have identified.

Take 15 minutes to prepare a 2-minute presentation that is clear, concise and coherent.

Presenter:

- Use the Introduction-Body-Conclusion basic presentation outline above to outline your presentation.
- Remember to consider your purpose, audience and style.
- Your fellow participants will assess you using the skills checklist on the next page.

Audience:

- Make notes on the checklist as you observe your fellow participants giving their presentation. After their presentation, provide them with “keep doing,” “start doing” and "stop doing" feedback.

Skills checklist – presentation evaluation

Opening	**Keep doing**	**Start doing**
Topic – gives topic or thesis of the safety talk		
Preview – sets out the supporting points		
Body	**Keep doing**	**Start doing**
Main points – makes the main points clear and easy to follow		
Transitions – uses words or phrases to transition between ideas		
Supporting details – uses facts, examples, statistics and details that support the main point		

Conclusion	**Keep doing**	**Start doing**
Thesis – restates the thesis in different words		
Summary – briefly restates main points		
Recommendations – provides some type of recommendations, future direction, next step, final thought		
Body language	**Keep doing**	**Start doing**
Eyes – makes eye contact across the audience		
Gesture – strengthens and supports speaking		
Expression – appears confident, friendly, focused and open		
Spatial command – is relaxed, calm, collected		
Speech quality	**Keep doing**	**Start doing**
Speed – speaks at a moderate speed		
Pause – uses well-placed pauses		
Volume – speaks loud enough for everyone to hear		
Clarity – pronounces words clearly		
Interjections – limits interjections (like, sighs, um, ah)		
Stop doing		

Workplace Essential Skill building: **Writing**

Task (optional): Write a final report

Write a final report for the Workplace Scenario: Precision Cabinets.

Use the information from:

- Precision Cabinets scenarios in all four modules
- Performance report activity in Module 3
- Notes from the Task: Collecting and organizing information for a final project report (in this module)

There may not be enough time to complete this activity in class. Report writing is an important part of project involvement. An opportunity to practice this skill and receive feedback will be provided for those who wish to complete the report and email it to the facilitator.

Appendix

Online Module 1:
Project Fundamentals and Initiation

Notes and task space

This section gives you a place to make notes, write down new information and highlight vocabulary. Writing information down helps you remember it better than if you just read it. This will also help you bring what you learned online to the class.

Lesson one: Defining project work

Notes

Brainstorm and draft

What is your definition of the term “project”?

Lesson two: What is project management?

Notes

Media task one: Discussion board etiquette

Notes and draft

Use this space to brainstorm then write a draft of your response to the question asked online in the Discussion Board.

Once you are satisfied with your short response, post it to the Discussion Board online.

Media task two: Project management journal entry

Brainstorm and draft

Online Module 2: **Planning the Project**

Notes and task space

This section gives you a place to make notes, write down new information and highlight vocabulary. Writing information down helps you remember it better than if you just read it. This will also help you bring what you learned online to the class.

Lesson one: The phases of project management

Notes

Lesson two: How to build a project team

Notes

Media task one: How to build a project team

Notes

Media task two: Phases of project management

Notes

Brainstorm and draft

Online Module 3: **Project Execution**

Notes and task space

This section gives you a place to make notes, write down new information and highlight vocabulary. Writing information down helps you remember it better than if you just read it. This will also help you bring what you learned online to the class.

Lesson one: Successful outcomes

Notes

Lesson two: Monitoring and controlling a project

Notes

Media task one: Managing people

Notes

Media task two: Positive versus negative management

Notes

Brainstorm and draft

Media task three: Managing a great project

Notes

Brainstorm and draft

Online Module 4:
Monitoring and Project Closure

Notes and task space

This section gives you a place to make notes, write down new information and highlight vocabulary. Writing information down helps you remember it better than if you just read it. This will also help you bring what you learned online to the class.

Lesson one: What is project closure

Notes

Media task one: How and why to close a project

Notes