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Chappelear, Erica D. *Improving the Soft Skills of Interior Design Project Managers*

Abstract

Project management is critical to project profitability and success in the building design industry. Typically, a project manager is expected to understand the industry, the process of design, and the technical aspects of managing the scope, schedule, and budget. Project managers must also lead and manage a team of people requiring soft skills in which they may not have been formally trained.

This study was conducted to develop a soft skills training program for interior designers at Company XYZ. The needs for the program were determined through historic firm records and conversations with project managers and firm leadership. The program was developed to include multiple sessions with a small cohort of similarly experienced project managers. The training program in this project includes outlines for each session, a training manual and materials for two of the sessions, and a proposal for program implementation.

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Chapter I: Introduction

Design education provides a strong background in visual skills focusing on proportions, light, color theory, and in recent years interior design software. Professionals in the field of interior design continue in this visual based work throughout their internships and early professional careers. This focus results in designs that are pleasing to the client and to the general public, however, great design is not the only requirement for a successful project and gaining future work. Successful design firms also understand that, to remain in business, good design must be accompanied by profitable projects.

Company XYZ is a mid-sized interior design firm with 110 employees. The firm is run by a five-person executive team and divided into four main focus areas based on the industry served. Projects vary greatly in size and some projects are run by two to three staff while others require as many as 20 staff.

The firm has seen ups and downs throughout its over 100-year history and survived the most recent recession which resulted in many changes to the company as well as the design industry. Company XYZ had to streamline some of its business processes during the recession and recovery which resulted in staff members at all levels doing whatever was needed to complete projects. Often a higher-level designer or project manager would do basic work on a project because the firm did not have adequate staff to whom the work could be delegated. Additionally, the interior design industry's projects have evolved through technology, especially with the use of newer software and three-dimensional (3-D) modeling tools such as Revit. The new software changes how much time was spent on drawing earlier in the project which made the scope, schedule, and budget more challenging to predict.

Project profitability is affected by aspects of the project that impact the scope, schedule, and budget. Predicting how a project will progress in its early stages requires a project manager to have past project experience and a strong understanding of project financial management. For projects that are not profitable it is important to understand the financial issues, but understanding the financials is only a part of why a project fails.

Over the past two years, Company XYZ has emphasized the financials of project management and yet they continue to see projects underperforming. Some of the leadership now recognizes that a focus on the project financials alone cannot solve their project management issues. Another key aspect of project management that is essential to the project's success is how the people are managed. Soft skills such as communication, time management, delegation, change management, team leadership, and staff development impact the success of a project and future projects. While project managers understand the need for these soft skills, many are unclear as to how they could improve their soft skills and how this will impact their project work.

In one instance a project manager delegated changes on a project to a junior-level staff member without giving enough instruction at the onset of the task. The project manager also failed to check in on the junior-level staff members progress until close to the deadline. When the work was returned, the junior-level staff member was moved to work on another project and the project manager then saw that the work did not meet the firm's standards. Proper delegation and communication on the front end and throughout the process would have saved hours of work. In the end, the project manager completed the work at a higher billable rate eating into the profitability of the project.

Statement of the Problem

At Company XYZ, project managers lack the soft skills in areas such as time management, team leadership, and delegation to efficiently run a project and support the people on the team in addition to the client. The consequences of limited soft skills result in miscommunication between the team and the client and delays in design and construction.

Purpose of the Study

The purpose of this study was twofold:

1. The study was intended to gather the best practices for teaching soft skills to project managers in the interior design industry.
2. The study was to create a training program that gave the project managers an approach to learning soft skills that worked best in the design industry.

Assumptions of the Study

This study assumes that increasing the soft skills of a project manager will make the overall project team more effective and efficient. The study also assumes that a project manager engaging in the designed training program will improve in their soft skills.

Definition of Terms

The following terms are specific to the interior design and construction industries and those used in this study are defined for clarity.

Analyze, design, develop, implement, evaluate (ADDIE). ADDIE is an instructional design process that aids instructional designers in systematically planning courses.

Andragogy. Andragogy is the teaching of adults.

Auto CAD. AutoCAD is a 2-D and 3-D computer-aided design program commonly used in the interior design industry.

Building information modeling (BIM). BIM is a digital model representing the physical and functional attributes of a structure. The program is also used in part of the Interior Design industry.

Core and shell. The core and shell are the exterior and major spaces (e.g. lobbies, staircases, toilets, elevators, units) of the building.

Fit out. Fit out is the process of making interior spaces suitable for occupation is considered the fit out. The term is common in an office development when the core and shell is completed for a larger building and each tenant has their own final fit out.

Furniture, fixture, and equipment (FF&E). FF&E are items that do not have a permanent connection to a building.

Revit. Revit is a commonly used BIM software program in the interior design industry.

Soft skills. Soft skills are personal attributes that allow a person to interact effectively with another person.

Methodology

Information from XYZ leadership and in meetings with project managers was critical in determining the most necessary soft skills for improvement in project management. Training was developed using the ADDIE model. The model is a well-tested framework for a comprehensive approach to training design that works well in many types of training design.

Chapter II: Literature Review

Project managers in the design industry are often former designers and have not been formally taught soft skills in areas such as time management, team leadership, and delegation. This results in projects being run inefficiently and a lack of support and guidance for the team members. Ultimately, projects can be delayed, and less profitable leaving stakeholders dissatisfied.

A successful design project requires solid project management including people management. Many project managers in design fields lack the people management soft skills to efficiently run a project and support the people on the team in addition to the client. These critical soft skills can help design teams avoid miscommunication, delays in design and construction, and make projects more profitable.

The literature review chapter focuses primarily on the overall purpose of project management and specific project management issues in the industries of interior design, architecture, engineering, and construction. The process for managing an interior design project is very similar to that of an architectural design (Emmitt & Mohammed, 2018). Therefore, both of these disciplines were included in this review of literature about project management in interior design and related design fields.

The review also includes an understanding of the responsibilities of a project manager with the procurement of work and managing the quality of the scope, the schedule, and the budget of a project, the formal project manager training that is available to those in design fields, and a review of the critical knowledge, skills, and abilities of a successful project manager. Finally, the literature review will explore ways in which firms can use systematic training and development of project managers to improve their soft skills.

Project Management Theory and Practice

The Project Management Institute (PMI) (2012) *A Guide to the Project Management Book of Knowledge (PMBOK® Guide)* defines project management as, “the application of knowledge, skills, tools and techniques to project activities to meet the project requirements” (para. 1, section 1.3). The PMI describes project activities including identifying project requirements, running internal and external project stakeholder meetings, communicating with the client and stakeholders, and balancing the project constraints such as scope, schedules, budget and quality (PMI, 2012). Snyder (2013) describes the PMI *PMBOK® Guide* as a standard for good practice but notes that it does not define the best practices across industries and organizations. It is important for organizations to understand the *PMBOK® Guide* as tool and not an instruction manual. Turner and Ledwith (2018) found that medium sized companies (51-250 employees) may need a different type of project management theory given the size of the project and orientation. The authors noted that project management processes in small and medium sized organizations are “less formal, more people-oriented, more customer-project management practices than larger firms” (Turner & Ledwith, p. 491). In similar research, Turner, Ledwith, and Kelly (2012) found some small organizations use non-specialist staff to run projects and mid-sized companies might have specialized project managers. People in both of these situations may need a less formal project management systems than staff in large organizations.

Purpose of Project Managers

Project managers are generally understood to apply technical knowledge and develop a structure to oversee a project from its inception until its conclusion (PMI, 2012). In an architectural design project, project management includes managing scope and quality required

by the client, the client's budget and schedule requirements, and personnel management of the team working on the project (Emmitt & Mohammed, 2018).

Before beginning the design process, project managers can also be effective in gaining new clients and gaining repeat business from clients. Nelson (2014), believes that to build confidence and trust from clients it is important for project managers to be involved in business development. Tichacek (2016), notes that a survey by Professional Services Management Journal (PSMJ) found project managers spend 7 to 12% of their time in business development activities. Soft skills, including communication and negotiation, may also be very useful in the business development aspects of project management.

As it relates specifically to the design aspects of the industry, VanderKaay (2005) describes the importance of knowledge sharing in architectural firms, as a way for firms to maintain or increase their competitive edge with clients. This knowledge sharing is important because it also recognizes that the knowledge of the firm can work toward improving processes and profits (VanderKaay, 2005). Knackstedt (2012) comments on the importance of good communication as a useful marketing tool with other professionals as another way to gain future work. Courtney (2016) noted a Society for Marketing Professional services study, that showed an increase in clients seeking project managers with strong business and soft skills. This study is important because it was completed with over 100 business development professionals in the architecture, engineering, and construction industries. The study demonstrates that project managers are critical to the success of projects and gaining future work for an enterprise (Courtney, 2016).

Components of successful project management and successful projects. Kerzner (2013) describes that firms engage in project management to, “create a continuous stream of

project success” (p. 24). This is one reason design firms have invested in project management but defining what makes a project successful has changed over time. The triple constraints of classic project management sometimes call the “iron triangle” consists of managing the quality of performance, the costs, and the schedule of a project (Atkinson, 1999; Kerzner, 2013).

Atkinson’s assumption of what constitutes good project management fails to include the totality of stakeholders involved in a project and the measurement of project success as a constraint in the project (Kerzner, 2013; Morris, 2008). Papke-Shields, Biese, and Jing (2010) note in their review of literature that there is a difference between project management success which focuses on the successful application of project management principles and the overall success of the project which is more often focused on long-term client satisfaction and project profitability.

Project management in design industries. Emmitt and Mohammed (2018) state that in an architectural design firm, project management can improve the overall result of the project by directly connecting the design team with the client. In this context, the project management literature uses the word scope instead of quality. The scope of the project may include the project uses, the project size, as well as the work to be performed by the design team (Simpson, 2017).

The Council of Interior Design Accreditation (CIDA) states that interior designers bring creativity and a technical understanding to buildings that allow them to design spaces for clients that meet the clients’ needs and account for the safety of the occupants (CIDA, 2018). Interior designers may work in a large firm or independently and are responsible for overseeing all phases of the interior design from concept through construction. Schlereth (2010) finds that the role of the interior designer as project manager is important to raise the profile of interior

designers. Additionally, the client benefits when the interior designer is engaged in the project management and can see the total picture of a project (Schlereth, 2010).

Knackstedt (2012) suggests an interior designer working independently or in a small firm is not immune to project management duties. The interior designer's role may be responsible for tasks often associated with project management such as, contracting with the client and budgeting, in addition to designing the project, researching and specifying materials, and preparing detailed drawings (Knackstedt, 2012). Even small-scale projects such as commercial fit outs, require careful management of the scope of the work. In an interior design contract, the project manager may need to be more detailed to identify who will be responsible for things such as FF&E or art selection and who will be responsible for their procurement and placement into the project (Winchip, 2013).

Project manager training in interior design education. The International Interior Design Association (IIDA) reports an increase in design professionals actively teaching students (Landry, 2010). In a survey of design program administrators, however, DesignIntelligence (as cited in Landry, 2010) found just 14% of programs were increasing their curriculum's emphasis on professional practice. A survey of current students and recent graduates revealed about 58% of the respondents said they felt their formal education prepared them well in the area of practice management (DesignIntelligence, n.d.). This disconnect in perception of business education can be further explored in the accreditation practices and course offerings of collegiate interior design programs.

The CIDA has 13 standard categories for accredited programs which must result in at least a bachelor's degree (CIDA, 2018). Design education must address a wide range of topics including history, the design process, light and color, and construction (CIDA, 2018) leaving

little time for the area of business practices and professionalism. The CIDA standards (2018) for business practices coursework includes elements of project management along with seven other topic areas including contract documents, professional ethics, and global markets and their impacts on design practices. A survey of regional undergraduate catalogs reveals programs typically offer only one formal course studying the business aspects of the interior design profession (Iowa State, n.d.; Mount Mary University, 2018; University of Wisconsin-Madison, n.d.). This lack of formal coursework leaves students graduating from design programs without in-depth project management training.

Another valuable way of learning business skill in the design professions is through real-world experience. Over half of students in interior design programs have participated in an internship as part of their education (DesignIntelligence, n.d.). This leaves a significant number of students without the practical knowledge of how a project runs through a real-life design process. For this reason, firms like Perkins + will expect to train business experience on the job for their rising leaders (Costello, 2005). An understanding of a project manager's core competencies can help determine what areas are most important for training.

Core Competencies of a Project Manager

Chipulu, Neoh, Ojiako, and Williams (2013) found that to support the success of the project manager and the project it was critical to identify the specific knowledge, skills, and abilities as well as behaviors that were important to the work of the project manager. PMBoK (2012) describes three areas of competence required for a project manager: knowledge, performance, and personal. Evaluating project manager competencies in the context of the fields of interior design and architecture reveals how this body of knowledge could be helpful to developing the skills of interior design and architectural project managers.

Chipulu et al. (2013) noted competencies in project management literature, including the PMBoK, focus more on the knowledge and performance competencies and less on the personal competencies of a project manager. Crawford (2005) researched perceptions of project manager competence in Australia, the United Kingdom, and the United States in project-based industries. This research is important because unlike prior research that was mostly qualitative in nature, this study compared a project manager's knowledge-based tests scores with their perceived effectiveness through supervisor ratings. This comparison showed that the knowledge of project management had less to do with the overall effectiveness of the project manager than their ability to use their personal competencies well (Crawford, 2005). Reviewing these areas of personal competence may be useful in identifying the lagging skills common in project management.

Project manager knowledge. The field of interior design and the related field of architecture requires a project manager to have enough experience with the process of design and the phases of working with a client to be successful (Simpson, 2017; Winchip, 2013). Interior designers' knowledge might include different project delivery methods including design-bid-build in which the designer takes on the responsibility for sending construction documents to contractors for bidding or design-build in which the designer and contractor are one and the same (Winchip, 2013). Noorhani (as cited in Mustapha, Mohammad, Noorhani, & Abidin, 2013) notes that the experience of being an interior designer first is important prior to becoming a project manager in the design industries. This is also reflected in other industries including construction where job announcements seek industry-specific skills more frequently than specific project management capabilities and personal leadership qualities (Chipulu et al., 2013).

However, across industries, the PMBoK (2013) states that to be a project manager you also must

have of knowledge of project management including the early phases of identifying a projects requirement and a client's needs.

Simpson (2017) supports the idea of early involvement by project managers noting that the involvement of project managers in the proposal process with clients allows for the project manager to better understand the goals of all parties and the budget surrounding the project. PSMJ also supports early project manager involvement in the proposal and even business development process as Nelson (2014) encourages project managers to demonstrate similar skills to that of entrepreneurs. This requires that the project manager have access to the tools and personnel necessary to sell the project work in addition to designing and delivering profit for the company (Nelson, 2014).

Project managers must also understand how the basic work of the project will be broken down, who will need to be involved, and when their skills are needed. For small-scale interior design projects in which the designer might be working more directly with the workers in the field, a work breakdown might overlap into tasks on the site including the steps of demolition and reconstruction (Winchip, 2013). However, in a large-scale project, the project manager might be more involved with creating the team organization and a developing a long-term schedule of work (Simpson, 2017). In these situations, often there will be a construction project manager in addition to the design team having a project manager.

Performance of a project manager. Braley (2001) also focuses measurement of project manager success more on external factors such as accounts receivable, revenue than a well-functioning and happy internal project team. The PMBoK (2012) highlights that the performance of a project manager is about what they can do or accomplish with the project while applying their knowledge. However, PMBoK also goes on to list 11 areas of behaviors or

interpersonal skills needed in project management including: leadership, team building, motivation, communication, influencing, decision making, political and cultural awareness, negotiation, trust building, conflict management and coaching (PMI, 2012). Therefore, in addition to specific industry skills, a project manager must have more subjective skills to lead a project. Interpersonal, leadership, and organizational skills are critical skills for a project manager (Simpson, 2017; Winchip, 2013). Simpson (2017) also affirms the need for a design project manager to develop comfort with conflict management. Conflict during the design and construction process might be found in a conversation with a client or contractor, unexpected project setbacks, or leading project meetings with a disruptive participant.

Toor and Ogunlana (2009) looked at the organizational factors and personal attributes that make project managers less effective. The work is important because it ties directly with the architecture, engineering, and construction industries, and large construction projects in which interior designers are likely to be part of the team. The results of the study are somewhat limiting given only five of the 78 respondents were design consultants (Toor & Ogunlana, 2009). Several themes in the results are pertinent to project management universally, especially those related to the soft skills of project managers.

Toor and Ogunlana (2009) in their study on ineffective leadership qualities suggest project managers should be selected carefully in an organization and be reviewed in areas including social and emotional intelligence. Davis (2009) supports this suggestion by finding that emotional intelligence was important for project management work that included conflict management, motivation, and problem-solving. The Davis (2009) study was helpful because it compared two measurements of emotional intelligence. The self-assessment of the project managers was compared to the results of a feedback from colleagues working with the project

manager. However, another self-assessment study with project managers in the construction industry found that emotional intelligence may not be as relevant when the tasks being completed are more cognitive and less people-oriented (Lindebaum & Jordan, 2012). Although the construction industry is often closely related to interior design, this study was limited to male project managers and some bias may be found in any self-assessment process. Conversely, Webber (2017) describes the importance of emotional intelligence in both managerial and non-managerial positions in the field of interior design. In a study of undergraduates and graduate students of interior design, Webber (2017) found they had higher levels of emotional intelligence than the general population. The Lindebaum and Jordan (2012) study may still be important for those in the interior design industry when working with internal staff on cognitive tasks or engaging with external consultants and contractors throughout the design process.

Fisher (as cited in Fisher, 2011), found that behaviors not just competencies are important in determining a project manager's effectiveness. Fisher (2011) goes on to expand with a study using focus groups and interviews of practicing practitioners along with literature review to determine the most important skills and behaviors of successful project manager. Though the number of interviews and focus group size were small, this study engages participants of equal gender representation with a wide range of years of experience. The skills that were identified included: managing emotions, building trust, influencing others, cultural awareness, leading others, and team building. Further, the study explains that application of the competencies through behaviors such as being genuine, showing concern, accepting people for who they are, empowering staff through delegation, and recognition of employees is required to be successful as a project manager in any industry (Fisher, 2011).

Critical external and internal communication skills. Poor communication was in the top five attributes that make project managers ineffective as leaders (Toor & Ogunlana, 2009). Interestingly, the lack of technical expertise was a very low-ranking factor for project managers' leadership. This may indicate that design firms should spend more time homing in on soft skills training and development for their project managers. Lack of communication across an organization and poor upper management support will not assist project managers in increasing their own soft skills to improve project performance (Toor & Ogunlana, 2009).

In interviews with several well-known designers, Schlereth (2010) noted external client communications may require frequent, even hourly, phone calls and prompt follow-up to a client depending on the phase of the project. Winchip (2013) emphasizes the importance of a clear plan of action for communication with all members of the project team internal and external at each phase of a project. Visual organization of internal team members, regular assessment of individual and team performance is additional important work of the project manager (Winchip, 2013). PSMJ's A/E Fees & Pricing Benchmark Survey (as cited by Tichack, 2016) reports that more than 70% of most firm's annual revenue comes from repeat clients and that being attentive to the client both during and after the project is important to obtaining future work.

Skills for team leadership. In a leadership study on a construction project, Zulch (2014) sought the best style of leadership for project managers based on the characteristics which were viewed as most important by the project team and the project managers themselves. Overall the study showed that trust in a project manager and the project managers actions were the most important to successful team leadership (Zulch, 2014). The study also pointed to the need for feedback and accountability within the team pointing to situational leadership, as the best leadership style to allow the team to be responsible for their work and have a strong sense of

collaboration (Zulch, 2014). Culter (2015) defines situational leadership as a flexible way of approaching a situation by leading based on what the leader encounters. Blanchard's (as cited in Berg & Karlsen, 2016) current situational leadership model identifies a level of support for teams and individuals including coaching, delegating, supporting, and directing. Berg and Karlsen's (2016) research points to a coaching leadership style as one that can be effective with teams that are difficult to lead and when limitations of time are critical in projects.

Training Soft Skills in Project Management

Toor and Ogunlana (2009) found lack of experience to be another one of the top five factors in project manager ineffectiveness. Additionally, many project managers did not begin their careers seeking to be project managers and rely on on-the-job learning to develop their knowledge, skills and abilities (Savelsbergh, Havermans, & Storm, 2016). Given the strong need for soft skills in project management, and the limited availability of formal project management training in many professional's educational backgrounds, it is important to examine the best ways of training project managers to improve project success.

Papke-Shields et al. (2010) gave a survey to active members of the PMI to better understand what factors in their projects allowed them to be successful. The population of the survey is helpful because the PMI requires members to obtain certain level of experience in project management prior to joining. The survey found that training in the practices of project management may contribute to the success of the projects. Chipulu et al. (2013) notes however, that project manager training must also be balanced with the skill interest from industries. This study placed more importance on industry-specific skills than on project management capabilities (Chipulu et al., 2013).

Techniques for training. Adult learning theories play an important role in developing training that can be transferred to the job Branch (2008). Andragogy, as developed by Knowles is one of the earliest and most known models for adult learning theory (Merriam, Caffarella & Baumgartner, 2006; Cercone, 2008). In this model adult learners Knowles (as cited in Merriam et al., 2006) are described as self-directing, coming into learning with their own resources, interested in learning as it applies to them, interested in solving problems, internally motivated, and needing a reason for the learning. Cercone (2008) points out that multiple learning theories may impact how courses are designed and that Knowles theory is should not be the sole guide. Some of the andragogy theory may just be that, theory, and other parts may truly lead to a best practice of design (Cerone, 2008). Schapiro (as cited in Cerone, 2008) points out the lack of context in andragogy around the broadness of the adult learning population including issues of power and the need for critical reflection in the adult learning process. Looking further at these theories can show some additional ways to work with soft skills training for project managers.

Cerone (2008) notes that self-directed learning may be a good path for some adult learners, but that due to instructor-led nature of how learning was provided in the past, some students may need to be assisted as they take more responsibility for their learning. Madsen (2012) presents a self-study guide for project managers to aid them in transferring the knowledge of project management into practice beginning with both self and 360-degree feedback. These assessments are important to set a benchmark of the project manager's current skill set (Madsen, 2012). This approach matches well with adult learning theories discussed by Welty (2010) including motivation and self-direction.

E-learning opportunities. Matthews (2011) indicates that learning soft skills on a virtual platform can help people learn about the soft skills theoretically but fails to give practice to

actually develop the soft skills. E-learning can however improve a person's awareness of the skill and provide a reason to improve it. Beyond that e-learning would need to be very carefully crafted and might require some way of simulating the soft skill before their behavior would change. Matthews (2011) argues that simulating a soft skill is very challenging. Luxford (2011) however, claims that there are ways that e-learning could be used in the teaching of soft skills. Some ways include making participants aware of a particular soft skill prior to joining a group or using virtual technology for discussions either over video chat or asynchronously with discussion boards. In both of these examples, there is interaction between users.

Peer and self-reflection. In discussing theories of adult learning, Frey and Alman (2003) discuss critical reflection as a way an adult can engage in transformative learning. Cercone (2008) states that transformative learning can help adults make sense of their learning as it relates to their context. Learners will need support to engage in reflection in the learning process as it has not generally been part of their past experiences (Cercone, 2008). This reflection for a project manager may begin with assessments about a learner's current abilities.

Bredillet, Tywnoiak and Dwivedula (2015) state that many of the standard competency assessments present contradictory dimensions. For example, the project manager may be asked to focus on what is best for the business or what is best for their client and these two things might conflict. The study therefore points to the need for a more holistic assessment based on what is right determined by an assessment of a project manager's performance through a communal sharing of the correct practices, ethically and intellectually, of a project manager as determined by that group's experience (Bredillet et al., 2015).

Ramazani and Jergeas (2015) also recognized complexity in projects as a challenge to successful project management. The researchers found that non-traditional ways of educating

project managers in the field would require the development of reflexive skills to respond to the increasing complexity of projects. The interviews of engineering-based project managers revealed that the practical project manager training in educational systems presented a one-size-fits-all approach to project management (Ramazani & Jergeas, 2015). Savelsbergh, et al. (2016) found that the informal learning aspects of a project manager's growth, could be enhanced by the sharing of experiences and self and group reflection through a structured project manager development program.

In earlier work Toor and Ofori (2008) also argue for a cultural support of developing leaders into authentic leaders as a way to build trust and manage conflict. Clarke (2010) noting the prior literature of the importance of soft skills, studied the effects of a two-day emotional intelligence training program for project managers. This study found that although results were not seen within the first month following the training, project managers did show an improvement in their demonstrated emotional intelligence six months after the training. Though not proven in the study, Clark (2010) hypothesized that these results may indicate additional on-the-job supports, or that the company culture aided in this improvement. Ekrot, Kock, and Gemünden (2016) found that continued learning with retention of key personnel is important to the success of project management in an organization. This study is important because it points to the importance sharing the lessons learned on projects to improve all project managers.

Coaching and feedback for individual growth. In a comparison of Knowles's theory of andragogy and principles of coaching, Cox (2006) found many similarities. Knowles (as cited in Cox, 2006) finds that adult learners seek learning with a practical approach that brings in their prior knowledge to their learning experiences in a tangible way. Additionally, Grant (as cited in Cox, 2006) sees coaching as a "result-oriented and systematic process." Cox (2006) also

highlights how other principles of coaching rely on the person being coached to set the direction of the learning experience. Madsen (2012) begins her project manager workbook by instructing a project manager in goal setting exercises to help them recognize areas in which they can grow. Madsen's (2012) work is important because it outlines many ways a project manager could complete self-study through reflection along with feedback from peers, managers and clients.

Experiential learning. Experiential learning, another theory of adult learning, is summarized as learning by doing (Cox, 2006; Lewis & Williams, 1994.) Cereone (2008) argues that instructors using this type of learning must ground it in the current knowledge and past learning of the participants. The doing of experiential learning brings about reflection to develop some new knowledge, skill or attitude (Lewis & Williams, 1994). An earlier definition by Kolb (as cited in Rezania and Blyth, 2009) describes more structure to experiential learning as learning which includes experience, reflection, cognition, and action. Experiential learning is growing in both academia and business (Beardon & Wilson, 2013; Rezania & Blyth, 2009) and utilizes a concrete and an abstract concept of the experience, a reflection on the experience, and transformation of the experience into action. Beardon and Wilson (2013) argue that the learner and their social environment must be engaged in a relational experience as part of the learning and that certain company cultures might require experiential learning to be designed to meet their culture. For example, if the culture embraces physical activity, the experiential learning might benefit from an active experience. Beardon (as cited in Beardon & Wilson, 2013) describes a possible typology for planning such experiences which begins with goal setting, creates a journey or task in which participants are challenged emotional, mentally, and physically, and using rules, risks, or obstacles to complete the experience in a set amount of time. An

experiential training event concludes with time of reflection and storytelling or sharing (Beardon & Wilson, 2013).

Baker, Jensen, and Kolb (2005), also explored conversation as a way to engage in experiential learning. The structure of the learning is bound by opposing forces such as reflection and action or individuality and relationality. The participants engage in conversations that hold and reflect on different viewpoints as a way of learning (Baker et al., 2005).

McDaniel and DiBella-McCarthy (2012) describe how leaders can use 360-degree feedback to promote personal reflection along with coaching or mentoring to improve their overall leadership self-efficacy. Daudelin (as cited in Parker, Hall & Kram, 2008) described basic ways to engage in reflection using individual sharing, followed by paired sharing, and finally a larger group reflection provides a simple structure to begin a reflective process. This practice of reflection requires leaders to pause and take time to engage with a coach or mentor or personally reflect using a journal. Reflection by an effective leader might also lead to a critical examination of more challenging choices, biases, and weaknesses (McDaniel & DiBella-McCarthy, 2011)

Reflective learning through journaling as described by Clydesdale (2016) led some of his students to see their errors in the workplace and determine a different course of action upon reflection (Clydesdale, 2016). In this experience, graduate students utilized structured journaling and were expected to tie their reflections from course learning to reflection about their daily work environment. While the subjects in Clydesdale's study were master's students, the results still demonstrate professional benefits to a reflective journal and could be explored further in a non-academic setting.

The ADDIE Model

Each of these adult learning models requires a plan or structure to execute them successfully. The ADDIE Model is a commonly used way to develop training systematically (Rothwell, Bencoster, King, & King, 2016). The ADDIE model is both conceptual and cyclical in nature allowing for instructional design to evolve over time (Branch, 2008). The model is broken down into five steps, analyze, design, develop, implement, and evaluate (Peterson, 2003; Branch, 2008).

The first step analyze evaluates the target audience and their learning needs (Peterson, 2003). During this step, the purpose of training is established, and the participants and resources including a general financial cost for the training, are determined (Branch, 2008). Peterson (2003) also recommends reviewing previous course evaluations if this or a similar course was already offer. This phase gives a training designer a high-level view of the program to be developed.

The design phase involves researching and identifying goals and objectives for the training and taking into consideration project limitations such as time and cost (Rothwell et al., 2016). Peterson (2003) adds that research at this stage can make subsequent stated earlier to complete. Branch (2008) notes that further development of a task list to complete the training, a list of performance objectives, the beginnings of an evaluation strategy such as testing of participants are essential to this phase. Although Peterson (2003) does not mention a cost-benefit analysis in this planning, Branch (2008) thoroughly outlines this task during this project phase.

In the third phase, development, the instructional designer must select or create the appropriate materials for instruction and training evaluation (Peterson, 2003). Rothwell et al.

(2016) note that there are many ways instructional materials can be prepared and that the formatting should be done to match the purpose of instruction. Branch (2008) describes a complete set of learning resources for the training including lesson plans, resources for outside content, strategies of instruction, directions for the instructor and the students. It is recommended that an instructor's guide include symbols to guide the session or examples and questions not included in the materials given to trainees (Branch, 2008). If the training is to be done at a very large scale, a pilot test of the program is also recommended during this phase (Branch, 2008).

During implementation, the training can occur in several ways including self-guided learning, classroom instruction, virtual instruction, or blended learning that combine multiple methods (Rothwell et al., 2016). At this point the training material development is complete. Peterson (2003), however, comments that although the material has been developed, it should not remain stagnant, rather the material may need to be adjusted to meet a participant's needs or interests. It is also important to think about the many people who may be part of the implementation including a facilitator that may or may not been intimately involved in the prior steps. Monitoring how the learners feel about the training can help a program to be more successful. Factors such as participant comfort in the space or engagement with activities can help program facilitator correct issues to enhance the transfer for learning from the facilitator to the participant (Rothwell et al., 2016).

Although evaluation is the fifth phase in the model, Branch (2008) notes that the evaluation phase determines what to evaluate and how to evaluate should be done throughout the ADDIE process. Peterson (2003) notes that during a development phase this evaluation might be formative such as a cost-benefit analysis and at the conclusion for a course a summative

evaluation might point to areas of needed improvement. The evaluation should be done based on the interest of the project stakeholders and may include qualitative or quantitative data for the evaluation of the instructional designers, facilitators, skill or knowledge improvements, the reaction of the learners, or transfer of the learning to the job (Rothwell et al., 2016). The evaluation phase must include a determination of criteria and tools as well as gather and analyze the data (Branch, 2008).

Conclusion

Project management requires technical skills to run the project and people skills to manage the people working on the project. Improvement in project managers soft skills can help project runs more smoothly, save time and money for the client, and earn more money for the design firm. The implementation of a soft skills development program using appropriate adult learning theories and methods can aid project managers in improving their soft skills while leading a team of people to complete the project. Using the ADDIE model to develop a soft skills program will allow for a solid course frame work to develop with flexibility to respond to feedback throughout the program.

Chapter III: Methodology

At Company XYZ, improvement of soft skills for project managers was determined to be necessary for future project success. Training needs were identified including areas such as time management, team leadership, and delegation. The project managers current limitations in soft skills resulted in miscommunication between the team and the client and delays in design and construction.

The formal training of interior designers produces professionals who can design spaces that work well for their clients and are aesthetically pleasing. As interior designers progress in their careers, they are frequently put in positions of managing projects and take on these roles without significant project management training. Swanson and Arnold (1996) describe how human resource development (HRD) can assist with improving organizational performance. HRD uses a combination of education and training interventions within the context of organizations (Swanson & Arnold, 1996). Training in the financial processes of the project and understanding critical soft skills to support the project team are both critical to completing a successful project.

This chapter discusses the methods for designing a project manager soft skills training program. It describes subject selection, data collection, and data analysis required to develop a complete program. Finally, the chapter reviews several limitations of this project.

Subject Selection

Company XYZ has had numerous roundtable discussions with managers. The participants of the various roundtable discussions were the focus of the information gathered for this research. The participants for developing the training program were selected based on their role of project managers. The participants selected have a similar number of years of experience

in project management. A total of six project managers working in a variety of project types were selected for the program.

Data Collection

Sources of best practices in project management came from various project management industry sources. A review of relevant literature was the primary source for exploring the best practices in overall project management. Notes from firm records of prior project management programs along with informal conversations with firm executives and project managers about processes for transferring knowledge to daily work flow was used to determine effectiveness of past training. Information gathered from past firm discussion notes was used to determine the needed performance areas for project managers in the firm. Finally, current project managers and firm executives also provided clarity about their expectations for the training program.

Data Analysis

The data gathered from the literature review and conversations with firm leadership and project managers was analyzed through qualitative methods. The analysis looked for patterns of information in the literature indicating the most important soft skills for project managers. Each possible soft skill was then evaluated as to its relevance for the project managers at Company XYZ. From the analysis broad goals for the training program, timing of the program, and topics for each session were determined.

Limitations

The limitations of this research study include:

1. The study can only be applied to project managers as Company XYZ.
2. The pace and spacing of the training sessions may be impacted by the needs of clients.

Summary

This chapter discussed the selection of the participants for training, the data collection, data analysis, and limitations of this study. The focus was on using the data to determine people to be trained and the topics for study. The next chapter continues to describe the design and development of the training program.

Chapter IV: Results

This study explored the best practices for teaching soft skills to project managers in the interior design industry and created a training program that gave the project managers a way to learn the necessary soft skills for project management in the design industry. This chapter outlines the data collected through firm research and conversations and describes how each step of the ADDIE model was used to create the training program.

Historical Records of Training

In recent years the firm has put an emphasis on project management as a way to improve profitability. Over the past three years, the firm's project managers participated in a project manager round table which included semi-regular presentations about the best practices for successful project management. The intent was that these best practices would become firm standards for project management. The intended practices combined firm culture with industry best practices from a PSMJ Boot Camp event. The PSMJ best practices focused mainly on the project financials and soft skills practices were only briefly mentioned.

During the project manager round table sessions, participants were given specifics of their roles as project managers in Company XYZ and their relationship to the responsibilities of the principal-in-charge of the project. The sessions also discussed financial management, contracts and fee estimation, and general business acumen. Following some technical training on the firm's project tracking software, the firm's leadership determined metrics for project success. Projects were given points on a range on technical factors such as receipt of a signed contract from the client and contractors and if accounts receivable were paid within 60 days.

Attendance at the project manager round tables was strongly encouraged, but due to client meetings and workload, attendance was sporadic. The leadership decided the continued education around project metrics would need to be done on a one-on-one basis.

Within the past 12 months, a new improvement plan had been developed in which the project managers review their project schedule and financials with a member of Company XYZ's accounting staff. While this practice has shown the financial issues on projects more clearly, company the leadership feels great improvements could be made if project managers were also better leaders of their internal teams. Conversations with several experienced project managers and company operational leadership led to the decision to further develop leadership and other soft skills training for project managers.

After an evaluation of the prior project manager round table sessions and conversations with company operational leadership, key soft skill areas were identified as critical to the company's future success. A voluntary soft skills training program was added to the round table format, but the lecture-style engaged a group too large for meaningful discussion. It was determined that learning may have taken place in this setting, but the transfer of this learning to the job context did not take place. Discussions with leadership confirmed that the topics identified for the monthly training series might still be useful, but the format of the training could not be the same.

After a review of literature and dialogue with current project managers and Company XYZ operational leaders, the new soft skills training program was developed. The future training was designed to assist project managers in leadership of team meetings, coaching of team members, and stakeholders clearly understanding the status of the project. Competencies

around these areas included leadership, time management, delegation, organizational skills, communication skills, relationship building, collaboration and team building.

Using ADDIE for Program Development

At Company XYZ the soft skills training and development program was created following the steps of the ADDIE process. For the scope of this field program, the first two steps of analyze and design were completed for all possible sessions, the development phase was completed for two of the training sessions, and the implement and evaluation phases are proposed.

The analyze phase determined the broad goal of the training program to be: At the conclusion of the soft skills development program, project managers at Company XYZ will be recognized as leaders in the firm through their ability to guide and direct internal teams. To achieve this goal, a training and development program was needed to focus on specific soft skills and time for reflection to aid in changing project manager behavior. From the literature review, firm documentation on desired areas of training, and conversations with current firm executives, the following areas were identified as important for a project manager soft skills training program: self-reflection, delegation, time management, team leadership, conflict management, internal communication, and external communication. The method of training required an in-person small group cohort which met on a semi-monthly schedule and focused on a one area of the soft skills needed during each session. To save on costs, the group would plan to meet in a conference room at Company XYZ.

The program was designed for a cross-team cohort of six project managers. Following the literature review, the group was adjusted to narrow the range of years of project management experience so that participants had similar experience levels in this role. The project managers

did vary in the number of years they had worked with this firm, but they had a similar number and size of projects they currently managed. The cohort would meet over the course of three months, every other week for a total of seven sessions. Sessions could range from two to four hours depending on the topics to be covered. The frequency and duration of the sessions allowed for self-reflection and self-study time away from the group. Each session was designed to include learning about a soft skill and reflection assignments to complete in between the learning sessions.

The learning sessions would primarily take place in a conference room at Company XYZ. However, should the group determine a visit to a project site would aid in their reflection, the program was designed to be agile enough to accommodate this need.

This success of the program will be determined through self-evaluation and 360-degree evaluations from their project teams and principals-in-charge. The intent is that the increased leadership will achieve long term gains in project and firm profitability.

Table 1

Project Managers Selected for the Initial Training Cohort

Area of Expertise	Current Number of Projects	Years in Project Management	Years of Professional Experience
Corporate 1	4	8	16
Corporate 2	3	5	12
K-12 Education	2	3	7
Health Care	6	8	12
Health Care	3	7	12
Multi-Family Housing	3	3	9

The design phase of the ADDIE process included reviewing what was learned in the analysis phase and determining the application of instructional strategies for the program. The program was designed with several core sessions and additional sessions based on the needs of the participants. For example, if the 360-degree reviews of the participants revealed they were very strong in giving presentations, this session of the training could be left out and more time spent on an area of weakness. The topics were selected based on the literature review of typical project manager soft skills competencies and activities. Then the overall program was outlined, and each session was outlined and reviewed with two potential project manager participants and the operational leader at Company XYZ. These outlines were further developed after feedback was given.

Each session was designed to utilize Gagne's (as cited in Rothwell et al., 2016) nine instructional events. The first event is capturing the attention of the learner. This was designed to use an experiential game or instructional storytelling. For example, in the delegation session three delegation games were designed to grab the learner's attention and help the participants begin to identify why delegation was important to their work and the development of the team and what a lack of delegation might cause. The second step outlined the objectives of the session stating clearly what the participants should be able to do upon completion of the session. The third step asked the participants what they already knew about the session topic through a group discussion. Because of the experiential learning activities used in some of the sessions, it is anticipated that participants will also reflect on this most recent experience in addition to the past experiences. The fourth step was focused on providing new information to the project managers followed by the fifth step which engaged them in a way to practice the new skill. The sixth step of providing feedback was designed to take place immediately and at the next session after the

project manager had more time to practice. Together the cohort completes step eight, evaluating the learning done both in the current session as a review and at the session that followed in a group conversation. During program implementation, the Gagne's ninth step of aiding in retention of the new knowledge will be done with self-reflection, group reflection, and coaching from market sector and firm leadership. For the scope of this project a high-level outline of the seven potential training sessions was created (see Appendix A for the outline of training sessions).

The development phase created the materials needed for the pre-training evaluations and each of the training sessions. Initial 360-degree evaluation surveys and self-evaluation reflection surveys were developed for the pre-training evaluation. The materials included the 360-degree evaluations for the project managers completed by the staff and the project managers self-evaluation forms (see Appendix B for the examples of the 360-degree and self-evaluation forms). Materials for the training sessions included manuals for the instructor and the participants. The materials for the delegation session included a training manual with detailed instructions (see Appendix C for the delegation session manual) and the PowerPoint slides and session materials for the participants (refer to Appendix D for the slides and activity handouts for the delegation session). The materials for the time management session included a training manual with detailed instructions (see Appendix E for the delegation session manual) and the PowerPoint slides and session materials for the participants (refer to Appendix F for the slides and activity handouts for the time management session). For the scope of this project, a complete manual, materials were completed for the sessions on time management and delegation.

Another key component in the development phase was the inclusion for developing materials needed for the evaluation of the program. In the case of this project, the project

managers were asked to individually reflect on their learning and give a brief reaction survey after each weekly session and again prior to beginning the next week (see Appendix G for a sample reaction survey).

The proposed implementation phase will launch the project manager development program using the materials created (see Appendix H for a proposed schedule). The program is proposed to launch during the summer months because these are less busy in general. The group will request 360-degree feedback from peers, their teams, and their market sector team leaders, to help focus their time together two weeks prior to the first session. This feedback will be reviewed and reflected on during the first session after which the future training for this particular cohort will be finalized. This process of using specific feedback about the project manager's performance will allow the program to be malleable to the needs of this cohort.

The final evaluation phase is explored through the ADDIE steps and a generalized direction was created as part of the scope of this project. The evaluation phase would begin with collection of data during implementation of the program and in the months following the program. Collecting reflection data from the participants throughout the training allows for an understanding of how the training and development program is working throughout the total duration. The responses from the participants will be based on their reactions to the sessions themselves and how they were able to apply the material after each session. The reaction surveys are designed after Kirkpatrick's enhanced reaction sheets which incorporate levels one through three of his well-known four-level evaluation model (Kirkpatrick, n.d.) (See Appendix G for reaction sheets).

Firm leadership and team members will also be asked to complete 360-degree feedback after three sessions are complete and at the conclusion of all of the training sessions. Additional

self-evaluation of the participants performance one month, three months and six months after the conclusion program will be an important way to understand if the learning is transferred to the job and a subject for future research. An example of the initial 360-degree evaluation forms and session reflection forms is included as part of this project. (see Appendix B for a sample 360-degree evaluation form).

Summary

Through careful exploration of past training, best practices for soft skills training, and firm needs analysis a training and development program for project managers was outlined and developed at Company XYZ. The soft skills training program was designed to be held over seven sessions. The ADDIE model gave a systematic approach to analyzing the needs of the project, designing and developing the appropriate material for the intended audience. For the purpose of this project, two of the seven sessions were fully developed, and all seven session were outlined. The final two steps of the ADDIE model are proposed as next steps.

Chapter V: Discussion, Conclusion and Recommendation

This project developed an interactive cohort style soft skills training program for project managers in a building design industry. The training focused on creating an outline for a seven-session program that allowed for learning, application, and reflection of critical soft skills of project managers. Two of the training sessions on delegation and time management were developed with complete training materials. The project involved gathering information from the firm, researching best practices for training project managers and soft skills training, designing and developing the training program.

Historic firm records, the firm leadership, and several current project managers provided information about what project manager training was already delivered in the firm. This included why soft skills had not been covered in the past and was still believe to be needed to improve project and firm profitability. A review of a wide-range of literature provided a broad understanding of best practices for soft skills training and the needs of this training in the building design industries. From this information the training objectives and goals were determined, and the initial training segments were developed.

Limitations

The following were limitations of the study:

1. The information gathering was limited to historic firm records and conversations with project managers.
2. The researcher did not complete a full needs assessment but worked from the information gathered.
3. The training program assumes that a qualified facilitator will lead the group through each session.

4. The training program assumes that the selected project managers will participate.

Recommendations

Project managers require knowledge of the total project design, financial, and soft skills needed to lead a team. Due to the nature of the design industry, time spent in training comes at a significant cost to the organization. If a firm develops their project managers in soft skills to lead their team well, the firm will see improvement in total team performance.

It is recommended that the firm complete the development of this training program and utilize an evaluation tool such as Kirkpatrick's four-level framework. Kirkpatrick (1996) describes four categories of evaluation data which can be gathered in the training process including reaction, learning, behavior, and results. A basic level one reaction survey to be administered at the end of each training session has been created (See Appendix G for a sample reaction survey). A level two and level three evaluation process should be developed for the program. Level two data is recommended to be gathered from the cohort and facilitator engaging in recording observations during and immediately after each training session. The 360-degree review feedback from before the training and a subsequent 360-degree survey administer three to six months after the training can aid in a level three evaluation. A level four evaluation could be pursued by reviewing project profitability at the start of the training and again six to twelve months after the conclusion of the training.

Finally, it is recommended that the firm increase access to training and development for staff through small cohort models. If the firm realizes increased success from this project manager cohort development program, they should consider offering future cohorts to all project managers in the firm.

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Appendix A: Outline for Soft Skills Development Program

Development Program: Project Manager Soft Skills Development Program

Overall Program Goal: At the conclusion of the soft skills development program, project managers at Company XYZ will be recognized as leaders in the firm through their ability to guide and direct internal teams.

Each session will be led by a staff facilitator from the training department. Certain sessions will also engage firm leadership or market-sector leadership.

Prior to the first session, all project managers must be given 360-degree feedback from staff in the firm and complete the self-assessment.

Session 1: Group Establishment & Reflection

All other sessions may be completed in the order determined to be best for the cohort's needs.

Additional Learning Session Topics:

- **Time Management**
- **Communication and Meeting Facilitation**
- **Team Building/Staff Development**
- **Conflict Management**
- **Leadership: Active Listening and Trust**
- **Delegation**

Session 1: Group Establishment and Reflection

Time Needed: 90 minutes

Session Objectives:

- Project managers will be able to identify the phases of a team
- Project managers will have identified how this cohort will function
- Project managers will identify their areas of strength and weakness from 360-degree feedback and self-evaluations
- Project managers will be able to identify the goals of self and group reflection
- Project managers will practice self-reflection

- 1) Introduction to the group
 - a) Group dynamics (forming, storming, norming, performing, and adjourning)
 - b) Setting of cohort ground rules
 - 2) Purpose of the gathered 360-feedback
 - 3) High-level review of all 360-feedback received
 - a) Team members will be given individual feedback
 - b) Overall discussion of the sessions to be covered by this cohort
 - 4) Purpose and goals of self-reflection
 - 5) Purpose and goals of group reflection
 - 6) Time for self-reflection
 - 7) Closing group reflection and questions
- * This session will start every cohort as it is needed to establish the cohort's purpose and objectives. The order of future sessions will be determined by the needs of the cohort.

References: Tuckman, B. W. (2001). Developmental sequence in small groups. *Group Facilitation*, 66(3). Retrieved from <https://login.ezproxy.lib.uwstout.edu/login?url=https://search-proquest-com.ezproxy.lib.uwstout.edu/docview/205826761?accountid=9255>

Session: Time Management

Note: This session requires that each member of the cohort carefully track their tasks for 3 days the week before the training. (See Time Log Chart)

Time Needed: 90 minutes

Session Objectives:

- Project managers will be able to identify their time management strengths and weaknesses
- Project managers will be able to describe potential time management techniques
- Project managers will identify which technique(s) they would like to try over the next month

Opening Group Reflection

- a) Discuss prior session learning
 - b) Discuss any learning in between the sessions
 - c) Peer-feedback using active listening
- 1) Discussion of their Time Log Charts
 - 2) Discussion of the perils of “busy”
 - a) Issues with multi-tasking
 - b) The domino effects of showing up late
 - c) Emergencies and interrupting others
 - 3) Engage the group in an exercise about focusing on more than one thing at once
 - 4) Engage the group in a distracted listening exercise
 - 5) Discuss how the group currently manages their time
 - a) What methods have they tried in the past
 - b) Which methods seemed to work best for them and why
 - c) Review firm time analysis report to see how much time they logged last month and what percentage of it was considered billable to a client
 - 6) Pair off and review the homework assignments
 - a) Each pair should reflect on the similarities and differences of their respective logs
 - b) Then each pair should discuss what areas they see need for improvement
 - 7) Review several techniques for improving their time management
 - a) Basic ways to limit email interruptions
 - b) GTD – Get Things Done – David Allen
 - c) The Eisenhower Box – Stephen Covey
 - d) Pomodoro Technique – Francisco Cirillo
 - e) Bullet Journal – Ryder Carroll
 - 8) Self-Reflection on which method they would like to try first
 - 9) Group Sharing
 - 10) Homework –
 - a) Test a model for one week, reflect via the group electronically, test a second model
 - b) Give each person a worksheet to evaluate their chosen methods

Presentation and Additional Resources:

Multitasking

Crenshaw, D. (n.d.) [Web log post]. Retrieved from <https://davecrenshaw.com/myth-of-multitasking-exercise/>

Get Things Done

Allen, David. (2009). Your guide to do it all! It's simple to get things done, no matter how much you have to do. Just follow this simple formula for success. (Brief article). *Boys' Life*, 99(11), 42.

Get Things Done. (n.d.) *Five Steps: Five simple steps that apply order to chaos*. Retrieved from <https://gettingthingsdone.com/five-steps/>

Successful by Design (2016, Sept 6). Getting things done (GTD) by David Allen – Animated book summary and review [Video File]. Retrieved from <https://www.youtube.com/watch?v=gCswMsONkwY>

The Eisenhower Box

Clear, J. (n.d.) How to be more productive and eliminate time wasting activities by using the “Eisenhower Box” Retrieved from <https://jamesclear.com/eisenhower-box>

The Pomodoro Technique

Cirillo, F. (n.d.) Do more and have fun with time management. Retrieved from <https://francescocirillo.com/pages/pomodoro-technique>

The Bullet Journal Method

Carroll, R. (2018) *The bullet journal method*. New York, NY: Penguin Random House

Bullet Journal (2015, May 21) *How to bullet journal*. Retrieved from <https://www.youtube.com/watch?v=fm15cmYU0IM>

Session: Communication and Meeting Facilitation

Time Needed: 120 minutes

Session Objectives:

- Project managers will be able to identify why internal team communication is important
- Project managers will be able to identify what they must clearly communicate with each team member
- Project managers will be able to explain when and why they would use a certain type of meeting
- Project managers will be able to demonstrate the creation of a project team's ground rules
- Project managers will be able to describe the roles to assign to team members for each meeting
- Project managers will reflect on their project team's next step to improving communication and meeting effectiveness

Opening Group Reflection

- a) Discuss prior session learning
 - b) Discuss any learning in between the sessions
 - c) Peer-feedback using active listening
- 1) Open new material with two stories of real-world consequences of poor leader and team communication
 - a) Team doesn't know who can answer a question, so they ask everyone
 - b) Client can't reach project manager, so they call everyone on the project team all the way down to an architectural intern
 - c) Can they think of other examples? (Reflection as a group)
 - 2) Discussion of these scenarios
 - a) Risks to the project, client and project manager
 - b) Why does this happen?
 - 3) Things every team member should be able to answer
 - a) Basics of the contract
 - b) Project scope
 - c) Project schedule – with major milestones
 - d) Location of all project files
 - e) Resources – BIM Model Manager or other key supports
 - 4) Different types of meetings and their purpose
 - a) Project kick-off
 - b) Project kick-off team of 1 or 2
 - c) Regular team check-ins
 - d) Project wrap-up (aka after action/lessons learned)
 - 5) Meeting facilitation 101
 - a) Structure of meetings
 - i) Preparation of the leader/facilitator
 - ii) Agendas with time estimates
 - iii) Group minutes and tasks

- iv) Carryover from prior discussions
- b) Team ground rules
- c) Assigning tasks – keeping everyone involved
- d) Encouraging participation
- e) Staying on task
- f) Dealing with meeting conflict
- 6) Describe and practice roles for an opening meeting (Repeat if time is available)
 - a) Leader
 - b) Facilitator
 - c) Time keeper
 - d) Recorder
 - e) Participant (participants may pick frustrating behavior they have experienced from their teams to see how others will react)
- 7) Group reflection

Session: Team Building/Staff Development

Time Needed: 4 hours

Session Objectives:

- Project managers will reflect on their methods of team collaboration
- Project managers will be able to demonstrate best practices for giving constructive feedback
- Project managers will be able to describe the techniques of an effective one-on-one employee check-in
- Project managers will map out a plan for staff development over the next month

Note: This session requires the facilitator to invite guests to evaluate a team's plan during the first exercise.

Opening Group Reflection

- a) Discuss prior session learning
- b) Discuss any learning in between the sessions
- c) Peer-feedback using active listening

Part 1- Activity and Discussion

- 1) Engage group in a Leadership and Teamwork Activity Inspired by *Business Improv*
 - a) Divide into two groups of three and explain steps b through e, but do not tell the group how this must be constructed and tested
 - b) Objective: Create an informational and fun activity to teach middle schoolers about your job
 - c) Use 10 minutes to think individually
 - d) Use 2 minutes each to pitch your idea to your group
 - e) Select the idea you like best and share with the larger group
 - f) Now reveal that the group has 20 minutes to create a mockup of their plan to explain to our guest evaluators
 - g) Bring in guest evaluators (if possible middle schoolers) for each team to present their idea.
- 2) Group discussion about what worked and didn't in their activity
- 3) Describe systems of team collaboration, risks and benefits and challenges
- 4) Group reflection on how the exercise inspires them to work differently with teams.

Part 2 – Staff Development

- 1) Giving productive feedback learning
- 2) Giving productive feedback exercise
- 3) Using one-on-one check-ins effectively
- 4) Developing a personal plan to track progress of team members
- 5) Group discussion and assignments

Resources:

Gee, V. & Gee, S. (2011). *Business Improv: Experiential learning exercises to train employees to handle every situation with success*. New York, NY: McGraw Hill.

Session: Conflict Management

Time Needed: 4 hours

Session Objectives:

- Project managers will be able to identify the benefits and causes of conflict
- Project managers will be able to identify the basic steps of a conflict resolution
- Project managers will reflect on their current projects and identify sources of conflict, a plan of action, support systems available to them

Opening Group Reflection

- a) Discuss prior session learning
- b) Discuss any learning in between the sessions
- c) Peer-feedback using active listening

Part 1: Overview of Conflict

- 1) Why we can't avoid conflict
 - a) Begin with guest speakers, team leaders who have stories of past firm conflicts
 - b) Give time for group reflection on their own recent conflicts
 - c) Have the group complete a simple self-assessment of their conflict style
- 2) Benefits of conflict
- 3) Causes of conflict
 - a) Types of behavior
 - b) Reflection on behavior types participants have experienced
- 4) What is the root cause?
 - a) Needs and wants of the person
 - b) How can we make use of their perspective?

Part 2: Working Through Conflict

- 1) Conflict Behaviors and Resolution
 - a) Thomas-Kilmann Conflict Mode
 - b) Diffusing
 - c) Active listening and body language
 - d) Being proactive
- 2) Self-reflection of likely conflict
 - a) Plan of action
 - b) Support system
 - c) Resources for additional study

Potential Resources:

Conflict Management Style Self-Assessment

Student Centre for Canadian Organizational Behaviour (2001) *Self-assessment*. Retrieved from: https://www.mheducation.ca/college/mcshane4/student/olc/4obm_sa_13.html

Thomas-Kilmann Conflict Mode Instrument

Kilman Diagnostics (n.d.) *An Overview of the Thomas-Kilman Conflict Mode Instrument (TKI)* Retrieved from: <https://www.kilmanndiagnostics.com/overview-thomas-kilman-conflict-mode-instrument-tki>

Additional Reading for Cohort:

Ascend (n.d.) *How people with different conflict styles can work together* Retrieved from: <https://hbrascend.org/topics/different-conflict-styles-work-together/>

Harvard Business Review (2007, November 15) *How to manage conflict* Retrieved from: https://hbr.org/2007/11/how-to-manage-conflict?referral=03759&cm_vc=rr_item_page.bottom

Session: Leadership: Active Listening and Trust

Note: This session should not be held until the group has met several times due to the trust segment of the session requiring the group to be more comfortable sharing.

Time Needed: 3 hours

Session Objectives:

- Project managers will engage in active listening practice
- Project managers will reflect on establishing trust as a leader

Opening Group Reflection

- 1) Discuss prior session learning
- 2) Discuss any learning in between the sessions
- 3) Peer-feedback using active listening

Introduction

- 1) Story of leadership – led by firm leader (guest speaker)
- 2) Group reflection on the themes of the story
- 3) Description of the parts of leadership we will engage with today

Part 1- Group Activity and Discussion

- 4) Engage group in practicing a critical leadership skill, active listening.
 - a) The cohort will divide into teams of three
 - b) Describe techniques for active listening
 - c) Each group of three will practices the roles below
 - i) The speaker will randomly select a question from a provided list
 - ii) The active listener engages the speak with their attention, paraphrases, etc.
 - iii) The observe makes notes about the interaction
 - d) The observer provides feedback to the active listener
- e) The group rotates roles and repeats until all have practiced active listening
- 5) Group observation discussion

Part 2 – Personal Reflection on Trust and Group Discussion

- 1) Describe the trust battery exercise from Rob Cserti.
- 2) Discuss with the group their comfort level in sharing with the cohort
 - a) engage in a group or self-reflection depending on the cohort's comfort level
 - b) reflect on which workplace relationships might need more attention.

Part 3 – Closing

- 1) Ask each project manager to reflection on active listening and trust levels and share during the next session.
- 2) Group reflection on additional leadership study for the group.

Resources: Trust exercise: Cserti, R. (n.d.) Trust battery.[Web log post]. Retrieved from <https://www.sessionlab.com/methods/trust-battery>

Session: Delegation

Time Needed: 2.5 hours

Session Objectives:

- Project managers will be able to identify the pitfall of a lack of delegation
- Project managers will be able to identify tasks that should be delegated
- Project managers will be able to identify to whom tasks should be delegated
- Project managers will be able to identify how to delegate appropriately

Opening Group Reflection

- a) Discuss prior session learning
 - b) Discuss any learning in between the sessions
 - c) Peer-feedback using active listening
- 1) Opening Activity
 - a) Delegation Vignettes - Each short activity will raise several issues about avoiding delegation in teams
 - b) Divide group into two teams of three to engage in the vignettes
 - 2) Engage in a group reflection about what was working in the activities and what was not
 - 3) Presentation on what should be delegated, to whom and how
 - a) What types of activities can be delegated?
 - i) Task that are easy should be given away
 - ii) Tasks that can be repeated again and again
 - iii) Tasks that are below our license so we can focus on tasks “at our license level”
 - (1) Better for the client’s bottom line.
 - (2) Better for project profitability
 - (3) Better for our team’s chargeability
 - b) Right Hand, Right Job. Making sure we delegate to the right people for each task. How do we know they are the right people?
 - i) Looks for tasks that will build up our team
 - (1) Know your staff goals for the year
 - (2) Review the competency maps to see what the next project task a staff member should be able to do to advance
 - (3) Help your staff stretch
 - ii) How do we know if someone is the right person?
 - (1) Do they show interest and desire to grow in this way?
 - (2) Are they dedicated to what you need to get done?
 - (3) Can they complete it in the time allotted?
 - (4) Do they have the overall ability?
 - c) How can we delegate to achieve optimal results?
 - i) Give instructions and demonstrate as needed
 - ii) Establish a plan for check-ins
 - iii) Check-in following the plan
 - iv) Wrap up the remaining work together to ensure success
 - d) Discuss with group

- i) How should we check-in without micro managing tasks?
 - ii) How can we ensure a successful outcome for everyone involved?
- 4) Let it go or how to get past our own hurdles to let go of tasks.
 - a) Building trust in our team
 - b) Knowing our teams' interest and expertise
 - c) Develop a group mindset
- 5) What factors do we need to be aware of in the organization?
 - a) Individual praise vs. group praise
 - b) Resource limitations (only certain staff have a software license for example)
 - c) Confusion from leadership (team leaders directly communicating with your team members without informing you)
- 6) Reflection and Closing
 - a) Ask the group to select a task they can delegate this week.
 - b) Pair them up to check-in at the end of the week, see that this task was delegated and select another for the next week
 - c) The group should delegate 3 significant tasks that they weren't planning on delegating and share with the group at the beginning of the next session

Appendix B: 360-Degree Evaluation Questions and Project Manager Self-Assessment

This questionnaire will be shared with all staff who interact with the project managers in the cohort. All submissions will be anonymous and protected by a password protected form on the company's data system.

Additionally, each project manager will be asked to complete their own self-assessment based on the same questions as the 360-degree evaluation questionnaire.

Project Manager 360-Degree Evaluation

This 360-degree survey is focused on how the Project Managers perform with their internal project team, firm support staff, and firm leadership. All survey responses are anonymous.

Name of the Project Manager (PM) are you evaluating: _____

Using the scale below, indicate how strongly you disagree or agree with each statement:

	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A*
The PM inspires their project team(s)					
The PM actively listens					
The PM deals with team conflict well					
The PM asks questions to find out other's opinions and check for understanding					
The PM states their views clearly and concisely					
The PM provides constructive project related feedback to the project team					
The PM helps individuals grow professionally					
The PM publicly praises team members					
The PM remains calm in stressful situations					
The PM takes responsibility for failures					
The PM demonstrates good personal time management					
The PM values all members of the team					
The PM makes decisions effectively					
The PM can explain decisions made to help others understand					
The PM effectively delegates					
The PM is prepared for team meetings					
The PM avoids micromanaging					
The PM helps the team stay focused					
The PM is a role model to other PMs					
The PM is a role model to junior staff					
The PM demonstrates good time management					
The PM demonstrates good work/life balance					
The PM motivates their project team(s)					
The PM coaches team members toward self-improvement					
The PM communicates the project status effectively					
The PM challenges their project teams(s) to be innovative					
The PM appropriately responds to stressful moments with the team					
The PM actively engages in their own growth					

*If you have been unable to observe this statement for this PM, select N/A

Project Manager 360 Evaluation (cont.)

What are this Project Managers greatest strengths?

In what areas could this Project Manager focus their growth?

Project Manager Self Evaluation

This survey is focused on how you perform with their internal project team, firm support staff, and firm leadership. All survey responses are anonymous.

Name of the Project Manager (PM) are you evaluating: _____

Using the scale below, indicate how strongly you disagree or agree with each statement:

	Strongly Disagree	Disagree	Somewhat Agree	Agree	Strongly Agree
I inspire my project team					
I actively listen					
I ask questions to find out other's opinions and check for my understanding of their views					
I state my own views clearly and concisely					
I deal with team conflict well					
I provide constructive project related feedback to the project team					
I help individuals grow professionally					
I publicly praise team members					
I remain calm in stressful situations					
I take responsibility for failures					
I demonstrate good personal time management					
I value all members of the team					
I make decisions effectively					
I can explain decisions made to help others understand					
I effectively delegates					
I am prepared for team meetings					
I avoid micromanaging					
I help the team stay focused					
I am a role model to other PMs					
I am a role model to junior staff					
I demonstrate good time management					
I demonstrate good work/life balance					
I motivate their project team(s)					
I coach team members toward self-improvement					
I communicate the project status effectively					
I challenge their project teams(s) to be innovative					
I appropriately respond to stressful moments with the team					
I actively engage in my own growth					

What do you feel are your greatest strengths?

In what areas do you feel you should focus your growth?

Appendix C: Training Manual and Materials for Delegation Session

Training Overview: This is one session of a soft-skills development program for Project Managers at Company XYZ. This 120-minutes session is focused on Delegation.

Time: 2.5 hours with one 10-minute break

Objectives:

- Upon completion of this training, participants will be able to:
- Identify common issues with a lack of delegation
- Identify the proper times to delegate, people whom and people whom they should delegate to
- Reflect on personal barriers they will face when delegating
- Demonstrate a basic delegation process

Equipment Required:

- A stopwatch or way to record time in seconds
- Connectable Building Blocks (a total of 200 blocks multicolored blocks will be enough for the activities, at least 60 of these blocks should be of the same color). These should be set up as follows:
 - 2 completed models made from connectable building blocks in another room.
 - One model should use 10-15 random blocks stacked together*
 - One model should be made 20 blocks of all one color*
- 2 sets of drawings of a simple connected block structure. One set will show more views than the other



Example Model



Time allotted (generally shown in minutes)



Self-reflection



Group Activity or Discussions



Reference or Handout



Presentation

How to use this manual.

The icons and slide thumbnails will guide you through the material as you progress.

Note: Slides are developed for only the new training material. There is not a slide for the opening of the session.



10 minutes

Opening group reflection: At the beginning of each session, give the participants time to discuss what insights they had from the last time the group gathered.

- Did they engage in any additional self-study?
- Did they discuss the learning with their project team, a mentor, or another staff member?
- Did they notice their learning in some other part of their life?
- In what ways did they apply their learning?

As a group discuss:

- What others noticed about each individual's reflections
- How the group thinks they might see the last session tie into the new material today



Instructions

These brief activities are designed to present some of the challenges faced with delegation.

The cohort of 6 should divide into two groups and elect their first team leader.



Group Activity

Vignette #1**Incomplete or Vague Information**

5 minutes

Direct the team leader that they will be getting instructions for the team's task in the next room.

The team leader is given as much as 60 seconds to look at the connectable building blocks design away from the rest of the group. They may not take photos of the object or draw anything. They will be told that if they do not use all of their time it may benefit their team. If the team leader leaves the model with at least 10 seconds of time left, they will receive a bonus envelope.

Inside the envelope could be:

- A card with nothing
- A card telling them they can answer 1 question of the team beyond their 20 seconds of instruction
- A card telling them they can go back to the room a look at the model again to provide additional instructions
- A card telling them they can physically help the team work on the model

When they return to the team, they will have 20

seconds to tell their team what to build plus any additional bonus they may receive.



Group Activity
**Vignette #2 –
Lack of Materials and
Distractions**



15 minutes

The team will have just 25 blocks in their collection of connectable building blocks, and they will be of all different colors. A new team leader will be selected and will have 45 seconds to view the model in the next room. This time they will not be restricted on answering questions from the team, but they still may not help in the actual building process.

With the model will be a clear note “The client insists that their model be made of all one color of bricks”

When the PM returns, they will realize the team doesn’t have 20 bricks of the same color. They will need to tell the team that they do not have the appropriate materials.

The team will have 5 minutes to come up with an alternative solution and build the model

- Team may ask the facilitator for spare parts and the spare parts could be located in a different part of the office. The team leader will need to decide who is the best person to go get the blocks.
 - o The facilitator may direct them to the parts but may require that both the team leader AND another player go requiring the team leader to direct those remaining before they leave
 - o The facilitator may intercept the returning group and charge them a “tax” which doesn’t allow them to bring all the bricks at once.
- Team may decide to build the model as is however due to this, the team leader must write out how they will defend this decision in the allotted time.

When the model is complete, the team leader will present the model to the facilitator. The facilitator should offer a brief critique of the work.



Group Activity
**Vignette #3
Changing Team Leader**



Split the group into two teams if possible, in separate rooms or areas of a larger room.

- The team leader will go into the other room expecting to see a model and instead they will be given paper drawings of a model. The drawings will not be labeled, but clearly go together.

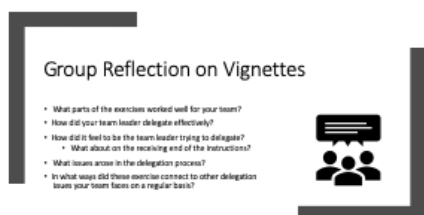
15 minutes

- The team leader will not be allowed to show the team the drawings but will need to instruct them on how to build the structure in 6 minutes.
- At the 3-minute mark, stop the groups and inform them that there has been a change in leadership and the teams are being restructured. The team leaders will then be asked to switch teams and complete the task



Group Discussion

15 minutes, Slide 5



Engage the group in a discussion about the delegation vignettes. Some suggested questions are on the slide:

- What parts of the exercises worked well for your team?
- How did your team leader delegate effectively?
- How did it feel to be the team leader trying to delegate?
 - o What about on the receiving end of the instructions?
- What issues arose in the delegation process?
- In what ways did these exercises connect to other delegation issues your team faces on a regular basis?



10 minutes

Break



Slides 6-10



40 minutes

*This slide will animate through each bullet point

What should we delegate?

- Easy
- Repeated
- Below our License
- Building-up Tasks

Ask the group to think about tasks that fit each category and share as you reveal each one. As the facilitator try to engage the participants in more stories of their work as it relates to each topic.

To whom should we delegate?

- Building-up Tasks
 - Staff Review Goals
 - Competency Maps
 - Stretching
- Right Hand, Right Job.
 - Interested
 - Dedicated
 - Time available
 - Ability

*This slide will animate through each bullet point

Remind the group of the resources in the firm (reviews and competency maps that can help them learn about their staff)

In thinking about delegation as a tool to build up junior staff:

- Look for each team member to reflect on a time when they were stretched by a manager because of a challenging task.
- Ask about the abilities of their teams and where their staff might need to or want to stretch

How can we delegate for optimal results?

1. Give instructions and demonstrate
2. Establish a plan for checking in
3. Follow the check-in plan
4. Wrap up the end of the task together to ensure quality

*This slide will animate through each bullet point

Walk through the four steps of delegating and ask again for the group to bring forward examples of how this has been done well for them in the past



Slides 11-14 Group and Self- Reflection



30 minutes

Group Discussion

How can we avoid micro-managing?
How can we ensure a successful outcome for everyone involved?



Discuss some of the personal challenges they might face in learning how to delegate effectively. Some questions that might also be helpful with this slide's discussion points:

- How have they been praised in the past for being the one to get work done?
- How can they avoid micromanaging tasks?
- How will delegation by them benefit the client?



Barriers to delegation

- Knowing our Team
- Trusting our Team
- Developing a Group Mindset

Discuss how to overcome some of the barriers of delegation by knowing and trusting their project team and developing a group mindset that the group together must be successful.



Organizational Factors

- Individual Praise or Group Praise?
- Resource Limitations
- Confusion from Leadership?

What Organizational issues might also be important to keep in mind? Examples to consider with this slide:

- How do we praise someone on our team who is an introvert vs. the extrovert?
- What software limitations do we have to delegation? (e.g. limited licensing for some graphic design programs)
- What can we do to keep our bosses aware of the team's activities, so they feel comfortable with our progress?



Reflection 15 minutes

Reflection



- What is a task you have been meaning to delegate by haven't?
- Pair-up
- Repeat this reflection for the next three weeks

Give the group 5 minutes to reflect on some of the tasks they haven't been able to delegate but would like to try to delegate. Instruct the group that they should select a task today that can be delegated in the next week.

Ask the group to pair up with another participant who will help keep them accountable.

Instruct each pair to schedule a time to meet one week from today to check on their progress and select another task to delegate the following week.



Closing

10 minutes

Close each session with a chance for each person to share one thing that was most impactful from the session.

Appendix D: Training Slides and Handouts for Delegation

Delegation to Improve Productivity and Develop Staff

Delegation Vignette #1

- Team Leaders will have 60 seconds to look at a model in the next room
- If you do not use all of your 60 seconds your team may benefit
- Return and give 20 seconds of instructions to your team

Delegation Vignette #2

- Team leaders will have 45 seconds to look at a model in the next room
- Return with instructions for your team
- Team leaders may not physically help with the building process

Additional instructions will be given as needed

Delegation Vignette #3

- Team leaders will be given instructions in the model room
- Teams will have 6 minutes to build the structure
- Team leaders may not physically help with the building process

Additional instructions will be given as needed

Group Reflection on Vignettes

- What parts of the exercises worked well for your team?
- How did your team leader delegate effectively?
- How did it feel to be the team leader trying to delegate?
 - What about on the receiving end of the instructions?
- What issues arose in the delegation process?
- In what ways did these exercise connect to other delegation issues your team faces on a regular basis?



What should we delegate?

- Easy
- Repeated
- Below our License
- Building-up Tasks

To whom should we delegate?

- Building-up Tasks
 - Staff Review Goals
 - Competency Maps
 - Stretching
- Right Hand. Right Job.
 - Interested
 - Dedicated
 - Time available
 - Ability

How can we delegate for optimal results?

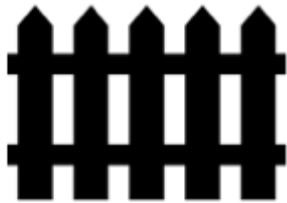
1. Give instructions and demonstrate
2. Establish a plan for checking in
3. Follow the check-in plan
4. Wrap up the end of the task together to ensure quality

Group Discussion

How can we avoid micro-managing?
How can we ensure a successful outcome for everyone involved?



Barriers to delegation



- Knowing our Team
- Trusting our Team
- Developing a Group Mindset



Organizational Factors

- Individual Praise or Group Praise?
- Resource Limitations
- Confusion from Leadership?

Reflection



- What is a task you have been meaning to delegate by haven't?
- Pair-up
- Repeat this reflection for the next three weeks

Cards for the Design Vignette #1

Unfortunately, it has been determined that your team will **NOT** benefit from your early model room departure. You have 20 seconds to tell your team what to build. You may not build with them, gesture ideas, or answer any additional questions.

Congratulations! Your quick action in the model room will benefit your team. You will give your team 20 seconds of instructions and may later answer one questions from your team during the building process. Your response may be up to an additional 20 seconds.

Congratulations! Your quick action in the model room will benefit your team. Proceed and give your team 20 seconds of instructions. You may return to the model room after they have started building to provide an additional 20 seconds of instruction during the building process. You may do this at the time you see best.

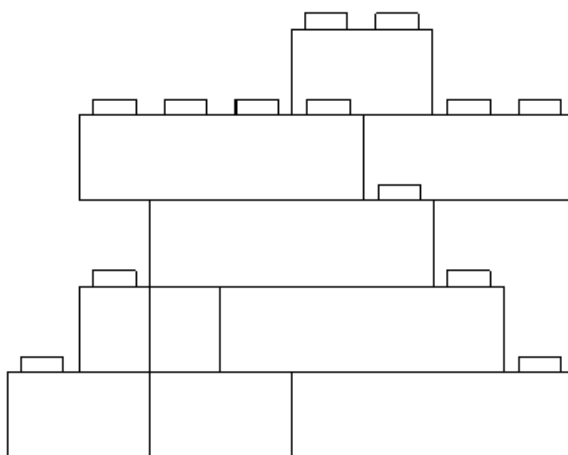
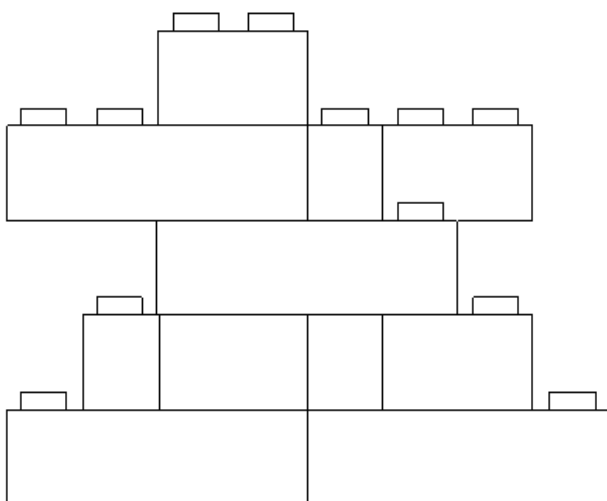
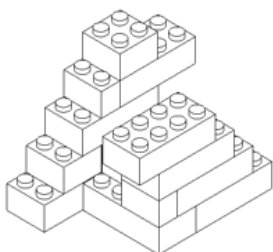
Congratulations! Your quick action in the model room will benefit your team. You may physically help your team build the model after giving them 20 seconds of instructions

Company XYZ

Project Manager Development

Delegation

Vignette #3
Team Leader 1

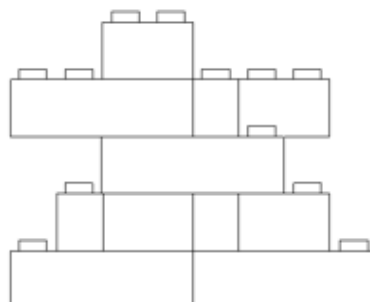
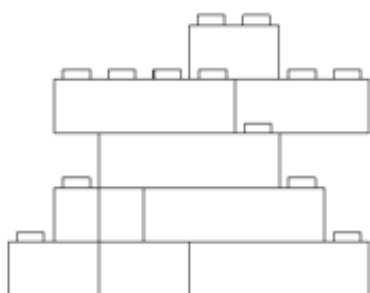
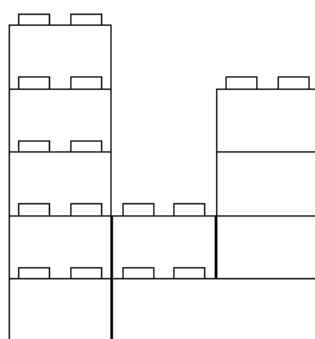
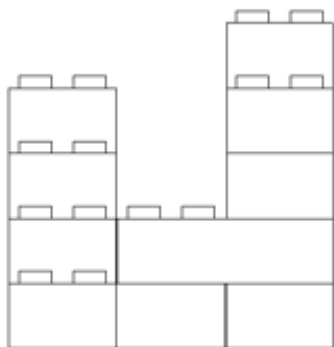
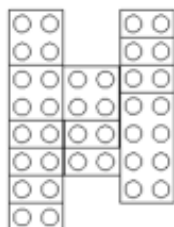


Company XYZ

Project Manager Development

Delegation

Vignette #3
Team Leader 2



Appendix E: Training Manual for Time Management

Training Overview: This is one session of a soft-skills development program for Project Managers at Company XYZ. This 120-minutes session is focused on Time Management.

Time: 2 hours and 10 minutes with one 5-minute break

-

Objectives:

- Project managers will be able to identify their time management strengths and weaknesses
- Project managers will be able to describe potential time management techniques
- Project managers will identify which technique(s) they would like to try over the next month

Note: This session requires that each member of the cohort carefully track their tasks for 3 days the week before the training. This should be assigned at the conclusion of the prior session.



Time allotted (generally shown in minutes)



Self-reflection



Questions or Group Discussion



Reference or Handout



Presentation

How to use this manual.

The icons and slide thumbnails will guide you through the material as you progress.

Note: Slides are developed for only the new training material. There is not a slide for the opening of the session.



Opening group reflection: At the beginning of each session, give the participants time to discuss what insights they had from the last time the group gathered.



10 minutes

- Did they engage in any additional self-study?
- Did they discuss the learning with their project team, a mentor, or another staff member?
- Did they notice their learning in some other part of their life?
- In what ways did they apply their learning?

As a group discuss:

- What others noticed about each individual's reflections
 - How the group thinks they might see the last session tie into the new material today
-



Time Log Reflection

5 minutes

Review Group Log-Charts:

Ask each person to pull out their record of their work for three working days the week before this training. Ask the group to reflect on their own on the following:

- Were these typical working days? Why or why not?
 - Did I accomplish what I wanted to on these working days?
 - How did I feel about work on these days?
-



5 minutes

Ask the group to find a partner and share their thoughts.



20 minutes

Slides 1-9

Review the session objectives:

- Project managers will be able to identify their time management strengths and weaknesses
 - Project managers will be able to describe potential time management techniques
 - Project managers will identify which technique(s) they would like to try over the next month
-

Managing Our Time

Perils of "Busy"

- We try to multitask
 - More time in total
 - Poorer work quality
 - Stress
- We show up late
 - Doesn't hurt us/our client
 - Hurts teammates/other clients
- We interrupt teammates work flow

If you have a personal story of time management you can tell it or open it to the group for a few suggestions.

- Ask the group examples of problems they have seen with multi-tasking
 - Ask about issues of having a packed schedule with no wiggle room
-

Activity #1

Write your name on a piece of paper

Engage the group in an activity, any piece of paper will work.

Ask them to write their name on a piece of paper and as the group does, time them. (If you don't have a stopwatch a simple count will do)

Activity #1

Count by 20's out loud to 200

Ask the group to perform this exercise together

Activity #1

Write your name on a piece of paper while counting by 20's out loud to 200.

Finally, ask the group to do both tasks at once.

Time the group again and briefly note the time difference. Give the group a moment to think about the simplicity of the distracted work and how much longer. What percentage of time was wasted?

Activity #2

- Partner up
- Person 1 – Share a short story from your morning
- Person 2 – Give Person 1 your undivided attention

For the second exercise ask the group to find a partner and follow the instructions of person 2 giving person 1 their undivided attention.

Activity #2

- Same Partner
- Person 1 – Share a short story from your morning
- Person 2 – check your email/phone/write a grocery list

Repeat the exercise with the new instructions on this slide, person 2 can do anything but leave their seat while person 1 shares a story about their morning.



How do you feel?
How well did that work?

Engage the group in a full group discussion of the exercises. Were they surprised by the difference in time in the first multitasking exercise? How did they feel when they were heard by their partner? What about when they were the distracted listener?



5 Minutes

BREAK



5 Minutes



50 minutes Slides 10-19

Perils of "Busy"

- We try to multitask
 - More time in total
 - Poorer work quality
 - Stress
- We show up late
 - Doesn't hurt us/our client
 - Hurts teammates/other clients
- We interrupt teammates work flow
- Breaks down teams

Return to the issues with a busy schedule.

Transition the group into thinking about solutions.
What techniques have they tried in the past?

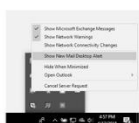
Tools To Try

- Efficiency Tips for email/mail/voicemail
- GTD – Get Things Done – David Allen
- The Eisenhower Box – Stephen Covey
- Pomodoro Technique - Francesco Cirillo
- Bullet Journal Method – Ryder Carroll
- Common tie - Prioritization

Describe briefly that some of the techniques we will use will feel like a great fit for the way they work and others might really stretch them. Encourage the group to try at least two the techniques in the coming weeks and reflect on how they work for them.

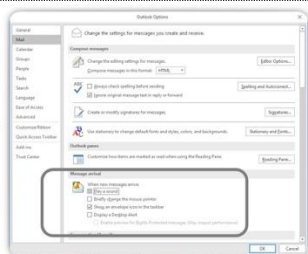
Email/Mail/Voicemail efficiency

- Turn off your notifications
- Check at specific times – limit your time 30 minutes
- Only Handle it Once!
 - Act
 - Refer
 - Trash
 - File
 - Newforma for project
 - Archive Box



Tell the group about several simple things they can do to ease up on the stress of email. Each topic will be covered in the coming slides.

Turn Off Notifications File > Options > Mail



Turning off on screen notifications can be a great way to remain focused on what you are working on.

Email/Mail/Voicemail efficiency

- Turn off your notifications
- Check at specific times – limit your time 30 minutes
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 - Archive Box



You can also select certain times of the day to check email and limit yourself to 30 minutes. *Note some project team cultures might promote the instant response. Encourage staff who are concerned about doing this to communicate with their team in advance what they are doing and why.*

Email/Mail/Voicemail efficiency

- Turn off your notification
- Check at specific times – limit your time 30 minutes
- Only Handle it Once!
 - Act
 - Refer
 - Trash
 - File

<https://hbr.org/2012/05/a-super-efficient-email-process.html>

<https://www.forbes.com/sites/patrickm/2012/12/11/efficiently-use-secrets-to-email-mastering/#5e6d6d6d6d6d>

<http://www.startuplessons.com/entrepreneur/avoid-it-once-productivity-principle/>

The OHIO Principle stands for Only Handle It Once. When you get an email, the concept here is to Act on it, Refer it to someone else or a to-do item, Trash it or File it for the long term.



Questions from the group



5 minutes

GTD – Get Things Done - Productivity David ALLEN

5 Steps

- Capture – Collect what has your attention
- Clarify – Process what it means
- Organize – Put it where it belongs
- Reflect – Review frequently
- Engage – Simply do

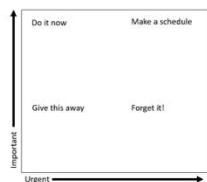


David Allen's famous Get Things Done Strategy is similar to the Ohio Principle. Walk the group through the 5 steps: Capture whatever has your attention, clarify what this item or task is about, organize and put it where it belongs (e.g. as a meeting on your calendar, as a to-do list item), reflect and review your to do and calendar frequently and engage in getting things done.

Prioritize – Eisenhower Box

- Is it Critical?
- Is it Urgent?

From Stephen Covey – 7 Habits of Highly Effective People



The next tool is the Eisenhower Box. The purpose of this is to prioritize what is critical and needs to be done now and what could wait or perhaps should never be done.

Give the group a moment to review the image.

Ask the group for an example of the items they might put in the matrix today.

Pomodoro Technique - Focus

- 25 minutes of work
- 5 minutes of break
- Repeat 4 times
- 15-minute break



<https://www.developgoodhabits.com/pomodoro-technique/>

The Pomodoro Technique is a newer time management technique. Developed in the 1980's this technique simply uses a timer and is intended to keep you keenly focused on one task for 25 minutes and then give your brain a break for 5 minutes. A longer break is taken after 4-25 minutes sessions.









The Bullet Journal Method

- Track the Past
- Order the Present
- Design the Future

Bullet Journal How To <https://bulletjournal.com/pages/learn>
One Note Bullet Journal Michelle Christensen <https://www.youtube.com/watch?v=2H8a2mg2cjs>

Our final technique is the Bullet Journal Method. This is a very recent addition to the time-management toolbox. The book published in 2018 describes the technique in detail but the YouTube video really describes it quite well.

If you want to try this technique and you are a

		OneNote user, there is a woman who modified this technique using OneNote or there is a Bullet Journal App.
	Self-Reflection on Techniques	
	5 minutes	<i>Give the group time to reflect on which technique they would like to try.</i>
	Pair Sharing	
	5 minutes	<i>Share as a pairs the next steps each individual plans to take.</i>
	Testing Methods and Reflection Assignment	
	5 minutes	<i>Give each participant a worksheet to reflect on their experiences over the week of each technique they test.</i>
	Closing	
	15 minutes	<i>Close each session with a chance for each person to share one thing that was most impactful from the session.</i>

Appendix F: Training Slides and Handouts for Time Management

Managing Our Time

Perils of “Busy”

- We try to multitask
 - More time in total
 - Poorer work quality
 - Stress
- We show up late
 - Doesn’t hurt us/our client
 - Hurts teammates/other clients
- We interrupt teammates work flow

Activity #1

Write your name on a piece of paper

Activity #1

Count by 20's out loud to 200

Activity #1

Write your name on a piece of paper

Activity #2

- Partner up
- Person 1 – Share a short story from your morning
- Person 2 – Give Person 1 your undivided attention

Activity #2

- Same Partner
- Person 1 – Share a short story from your morning
- Person 2 – check your email/phone/write a grocery list

How do you feel?
How well did that work?

Perils of "Busy"

- We try to multitask
 - More time in total
 - Poorer work quality
 - Stress
- We show up late
 - Doesn't hurt us/our client
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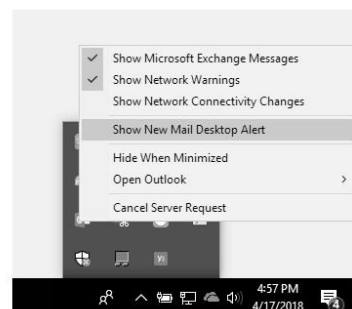
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- Bullet Journal Method – Ryder Carroll

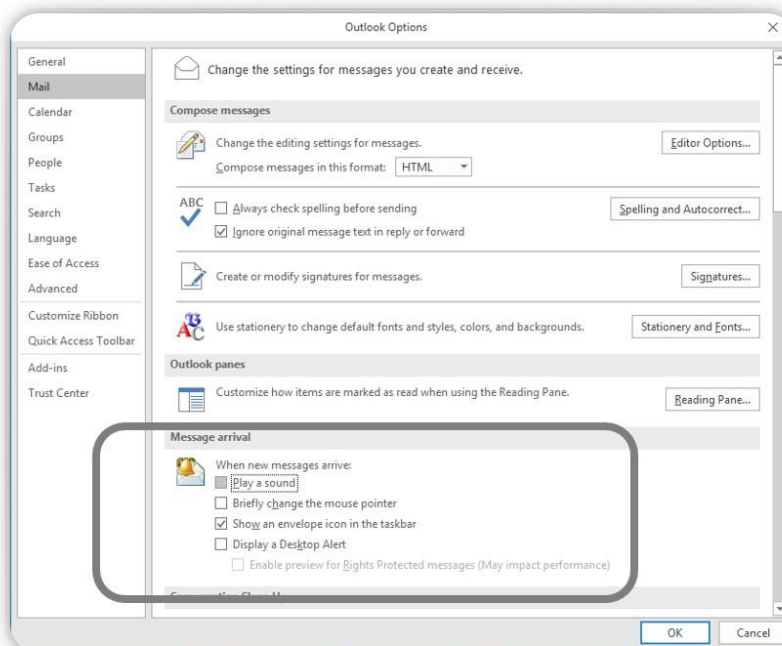
- Common tie - Prioritization

Email/Mail/Voicemail efficiency

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- Check at specific times – limit your time 30 minutes
- Only Handle it Once!
 - Act
 - Refer
 - Trash
 - File
 - Newforma for project
 - Archive Box



Turn Off Notifications
File > Options > Mail



Email/Mail/Voicemail efficiency

- Turn off your notifications
- Check at specific times – limit your time 30 minutes
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 - Act
 - Refer
 - Trash
 - File

<https://hbr.org/2012/05/a-super-efficient-email-proces.html>

<https://www.forbes.com/sites/patbrans/2012/12/11/efficiently-yours-six-secrets-to-email-mastery/#36e6deb61f68>

<http://www.asianefferency.com/mindsets/touch-it-once-productivity-principle/>

GTD – Get Things Done - Productivity David ALLEN

5 Steps

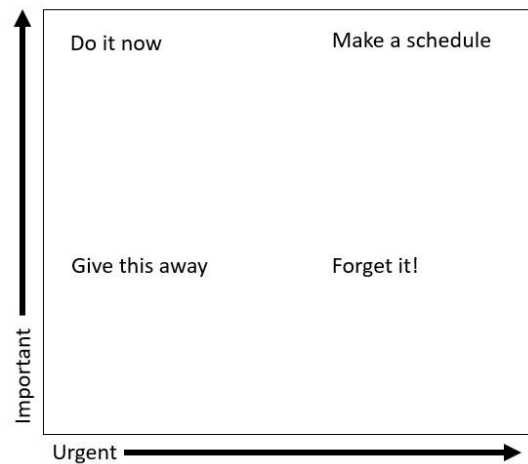
- Capture – Collect what has your attention
- Clarify – Process what it means
- Organize – Put it where it belongs
- Reflect – Review frequently
- Engage – Simply do



Prioritize – Eisenhower Box

- Is it Critical?
- Is it Urgent?

From Stephen Covey – 7 Habits of Highly Effective People



Pomodoro Technique - Focus

25 minutes of work

5 minutes of break

Repeat 4 times

15-minute break



<https://www.developgoodhabits.com/pomodoro-technique/>

The Bullet Journal Method

Track the Past

Order the Present

Design the Future

Bullet Journal How To <https://bulletjournal.com/pages/learn>

One Note Bullet Journal Michelle Christensen <https://www.youtube.com/watch?v=2HRwZmgZcJs>

Company XYZ

Time Management

Project Manager Development

Use the notes page to reflect on your general impressions of each technique and at the end of the session rank them in order of which you think would work best for you. Commit to trying one or two methods over the next 3 weeks.

Method & Resources	Thoughts for my personal style	Rank of technique
Email/Voicemail/Mail		
<ul style="list-style-type: none"> • Turn off notifications • Check at specific times • Limit your time to 30 minutes of email • OHIO – Only Handle It Once. <ul style="list-style-type: none"> ○ Act ○ Refer ○ Trash ○ File <p>Bregman, Peter (2012, May 8) A super-efficient email process. Retrieved from https://hbr.org/2012/05/a-super-efficient-email-proces.html</p>		
Get Things Done – David Allen		
<ul style="list-style-type: none"> - Capture - Clarify - Orangize - Reflect - Engage <p>Successful by Design (2016, Sept 6). Getting things done (GTD) by David Allen – Animated book summary and review [Video File]. Retrieved from https://www.youtube.com/watch?v=gCswMsONkwY</p> <p>Get Things Done. (n.d.) <i>Five Steps: Five simple steps that apply order to chaos</i>. Retrieved from https://gettingthingsdone.com/five-steps/</p>		
The Eisenhower Box – Steven Covey		
<p>A decision matrix</p> <ol style="list-style-type: none"> 1. Urgent and Important (do immediately) 2. Important, but not urgent (schedule) 3. Urgent, but not important (delegate) 4. Neither urgent nor important (eliminate) <p>Clear, J. (n.d.) How to be more productive and eliminate time wasting activities by using the “Eisenhower Box” Retrieved from https://jamesclear.com/eisenhower-box</p>		

Company XYZ**Time Management****Project Manager Development**

Method & Resources (con't.)	Thoughts for my personal style	Rank of technique
<hr/>		
Pomodoro Technique 25 minutes of work 5 minutes of break Repeat 4 times Then, 15-30 minute break Cirillo, F. (n.d.) Do more and have fun with time management. Retrieved from https://francescocirillo.com/pages/pomodoro-technique		
Bullet Journal Method Track the Past Order the Present Design the Future Carroll, R. (2018) <i>The bullet journal method</i> . New York, NY: Penguin Random House Bullet Journal (2015, May 21) <i>How to bullet journal</i> . Retrieved from https://www.youtube.com/watch?v=fm15cmYU0IM		

Company XYZ

Project Manager Development

Time Management

Self-Reflection

Which time management technique did you try?

Why did you think this technique might work best for you?

In what ways do you feel the technique helped you?

How successful do you feel you were at applying the technique as it was designed?

In what ways do you think you would like to continue using this technique?

How might you modify it to work even better for you?

Appendix G: Reaction Survey for Training Sessions

Session objectives:

	Strongly Disagree	Disagree	Agree	Strongly Agree
I understood the session objectives				
I was challenged by the material				
I was able to connect the objectives to the activities/discussion during the session				
I am clear about what is expected of me as a result of this development program				

Course Materials and Relevance

	Strongly Disagree	Disagree	Agree	Strongly Agree
I could easily follow the course materials				
I feel the course materials will help me beyond today's session				
I will be able to apply today's content to my work in the next two weeks				

Facilitator/Delivery

	Strongly Disagree	Disagree	Agree	Strongly Agree
I remained engaged during the training session				
I was comfortable with the pace of the session				
I felt the session was covered in the right length of time				
I felt supported by the facilitator during the session				
I was confident in the facilitator's knowledge				

Program Structure/Space

	Strongly Disagree	Disagree	Agree	Strongly Agree
I was able to express my understanding of the content				
I was able to stay focused based on when we were given breaks				
I reflection times were appropriate in length for my needs				
I was comfortable in our meeting space				

What was the best part of today's session?

What do you think should have been included that wasn't?

Self-Reflections for each training session

These questions will be given to each participant at the end of each session. They are intended to be reflected on immediately and shared with the group at the start of the next session.

‘Each session may also add questions specific to the topic of that session.

What are the three most important things you learning from this session?

What aspects do you think you will apply to your work?

What barriers might you encounter as you apply these new ideas or skills?

How might you overcome these barriers?

How do you feel your work in this training program could impact the firm?

(After the 2nd session and through the duration of the program)

What positive results are you already seeing as the results of your effort?

Appendix H: Plan for Implementation

Time Needed	Action
4 weeks before start of cohort	Confirm selection of cohort participants: Review outline of sessions and dates with firm and project sector leaders to ensure project managers will have time available
3 weeks before start of cohort	Send 360-reviews to firm. Send self-evaluation materials to participants. (2-week window for responses) Gather current project technical status for each cohort member using current metric standards ¹ .
2 weeks before	Reminder of the 360-reviews and self-evaluation deadline
1 week before	Review survey and evaluations for patterns and discuss overall themes with leadership to finalize topics this particular cohort will cover and if any training should be modified for their needs
Cohort Begins!	First meeting 90-minutes Include finalizing the meeting schedule to make any adjustments for participants
Week 1	Begin to gather reaction feedback from participants
Weeks 2-5	Hold sessions every 3 weeks and gather feedback and observations from stakeholders
Week 6	Send second 360-evaluation for cohort members to the firm.
Weeks 6-12	Hold sessions every 3 weeks. Gather observations from stakeholders.
Week 13	Celebrate the conclusion of the cohort development period! Send 360 forms to the firm as participants to complete a new self-reflection form. Pair members of the cohort team for continued 1-hour per month minimum peer coaching through week 52.
Week 17	Connect with cohort participants one-on-one to discuss what parts of the development program they are applying the most. Compile basic findings and results of surveys for firm leadership. Remind cohort to meet for peer coaching session.
Week 18	Meet with firm leadership to determine if the project will continue with another cohort. If needed discuss possible members for Cohort 2
Week 19 ²	Review Cohort 2 selections with project sector leaders, finalize and continue the process from the “3 weeks before start of cohort” from the first round of the development program.
Week 21	Connect with cohort participants for second one-on-one discussion of the value of the development program to their daily work. Remind cohort to meet for peer coaching session.
Week 25	Review current project technical status for each cohort member using the firm’s metrics. Look for change in schedule and budget figures. Remind cohort to meet for peer coaching session.
Weeks 26-52	Continue to monitor metrics on projects to complete evaluation of project success.

¹ As projects begin and conclude use standard firm vendor for client satisfaction surveys.

² Steps in grey would only be completed if the firm leadership invests in Cohort.