Emotional Intelligence: The Secret to Highly Effective Stakeholder Engagements

Stephen Wagner
PMI Breakfast Series
Agenda

• Speaker background
• PMBOK changes stakeholder engagement
• Review of Emotional Intelligence (EI) principles
• Role of EI in stakeholder engagement
• Conclusion & questions
Before we start...

- This breakfast session should (hopefully) be a dialog
  - Agree with my arguments? Disagree?
  - Do the points make sense?
  - Are there any examples you have come across?
  - What does this mean to you?
Stephen Wagner Background

• Consultant with Cardinal Solutions Group
  – Currently at Vantiv as Scrum Master
• Worked at P&G/Gillette 14 years
  – Relocated to Ohio from Massachusetts in 2007
• PMP since 2005 (PMBOK 2nd edition!)
• Attorney for 10 years before switching to IT as programmer during Y2K
PMBOK 5th Edition
Changes for Stakeholder Engagement
PMBOK Changes

- PMBOK 5 published August 2013
- Most significant change:
  - Creation new Knowledge Area
    - Project Stakeholder Management
PMBOK Changes

• 2 new processes:
  – Plan Stakeholder Management
  – Control Stakeholder Engagement

• Shifted 2 existing processes to new KA:
  – Identify Stakeholders
  – Control Stakeholder Engagement
Why the Changes?

“Aligns with the growing body of research showing stakeholder engagement as one of the keys to overall project success” (p 470)

“Stakeholder satisfaction should be managed as a key project objective” (p 391)
What do you think?

• Are the PMBOK 5 authors correct?

• Does this reflect your experience?
Review of Key Emotional Intelligence Principles
Review of EI

• History
  • Term first appeared in PhD thesis 1985
  • Popularized by Daniel Goleman

• Since then significant amount of books and articles (1,100+ in Amazon)
Review of EI

• What is EI?
  • Science behind EI
    • How is the brain “wired” – Amygdala (ah-mig-da-la)
    • Fight or Flight – Physical survival in primitive world
    • Limbic System – Governs feelings, impulses, drives – Learns best through motivation
Emotional Intelligence

• Five key domains
Self Awareness

• Ability to recognize & monitor internal states, preferences & feelings

• Tools for Self Awareness
  – Personality tests – Myers Briggs, DISC, Birkman, etc.
  – Reflection & review – recognize what circumstances bring out best & worst of you
  – 360° assessment by peers to reveal blind spots
Self Awareness

• Example:
  – PM knows working under pressure brings out the worst in her

• Response?
  – Manage time well
  – Get needed data quickly
  – Keep track of commitments
Self Management

• Managing internal states – avoiding disrupting impulses & moods
  – Think before acting
  – Like an ongoing inner conversation

• Tools for Self Management
  – Use reflection and thoughtfulness often
  – Develop comfort with ambiguity
  – Always be open to novel ideas & approaches
Self Management

• Example:
• Java Developer informed position is being outsourced to offshore vendor
• Response?
  – Take active role in knowledge transfer
  – Look for opportunities to lead new team
Empathy

• Ability & skill in understanding emotional makeup of others

• Tools for Empathy
  – Gain knowledge of cultures & norms
    • example – know news & major events of offshore teams’ home country
  – Practice service orientation
  – Seek opportunities to leverage diversity of team
Empathy

• Example:
  – Project demo suffers major outage. Problem traced to bug missed in testing by offshore QA team.
  – Response of Project Manager?
    • Empower testing team to raise “No Go” anytime & without pressure from stakeholders
    • Work with stakeholders to obtain better defect mgt. software
Social Skills

• Proficiency in managing relationships, building rapport & finding common ground

• Tools for social skills
  – Negotiation skills –
    • “Getting to Yes”
    • Conflict management
  – Clear & unambiguous emails & other communication
  – Always “Take the high road”
Social Skills

• Example:
  • Project Manager works with users frustrated with accounting system.

• Response?
  – Visit with users. Engage dev team to provide workarounds & document a new user guide
  – Volunteer to be on call off-hours during monthly financial close
Motivation

• What is it? - Pursuing goals with energy and persistence

• Tools
  – Metrics & progress tracking often promotes action
  – Practice “Sharpening the saw” (Covey)
  – Self Knowledge of “motivators” & “de-motivators”
Motivation

• Example:
  – Project Manager wants to employ “sense of urgency” in project.

• Response?
  – Take aggressive steps to be ahead of issues instead of catching up
  – Always have metrics and project schedule updated & accurate
Role of Emotional Intelligence in Stakeholder Engagement
Role of EI in Stakeholder Engagement

• EI is the “Secret Sauce” to make PMBOK stakeholder tools & techniques are more effective

• Examples from PMBOK:
  – Engagement Assessment Matrix
  – Interpersonal Skills
  – Management Skills
Role of EI in Stakeholder Engagement

• Engagement Assessment Matrix

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Unaware</th>
<th>Resistant</th>
<th>Neutral</th>
<th>Supportive</th>
<th>Leading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder 1</td>
<td>C</td>
<td></td>
<td></td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>Stakeholder 2</td>
<td></td>
<td>C</td>
<td></td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>Stakeholder 3</td>
<td></td>
<td></td>
<td>D</td>
<td>C</td>
<td></td>
</tr>
</tbody>
</table>

• Key EI principles to apply?
  – Empathy
  – Social Skills

C = Current Level  D = Desired
Role of EI in Stakeholder Engagement

• Interpersonal Skills
  – *Building trust*,
  – *Resolving conflict*,
  – *Active listening*, and
  – *Overcoming resistance to change* (p.407 PMBOK, 5th)

• Key EI principles to apply?
  – Self Mgt
  – Empathy
  – Social Skills
Role of EI in Stakeholder Engagement

• PM Management Skills
  – Facilitate consensus toward project objectives
  – Influence people to support the project
  – Negotiate agreements to satisfy the project needs
  – Modify organizational behavior to accept the project outcomes
  (p.408 PMBOK, 5th)

• Key EI principles to apply?
  – Motivation
  – Social Skills
  – Self Mgt.
Role of EI in Stakeholder Engagement

- Other stakeholder situations Emotional Intelligence may help
  - Issue Escalation
  - Team member conflicts
  - Conveying “bad news”

Discussion: Any other situations?
Summary

• PMBOK 5 – Additional emphasis on stakeholder engagement
• Emotional Intelligence provides PMs tools & techniques for better results with Stakeholders
• Also, EI gives PM greater capability for managing project team
Further Reading

- Primal Leadership – Leading with Emotional Intelligence
  Daniel Goleman

- Emotional Intelligence for Project Managers
  Anthony Mersino
What Else?

- Questions
- Open Discussion