**CHAPTER 3** | **THE PROJECT MANAGER ROLE**

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## THE ROLE OF THE PROJECT MANAGER

There are many types of managers in organizations. Functional managers have an oversight responsibility for functional or business units. Operations managers are responsible for ensuring that business operations perform efficiently. Project managers are responsible for achieving the objectives of the project they manage.

The *PMBOK® Guide* emphasizes that project management is critical to an organization's success.

### Things to Know

1. The various components of the **sphere of influence**
2. The components of the **Talent Triangle**®
3. The difference between **power** and **authority**
4. Various **types of power**
5. Various **leadership styles** and when it is appropriate to use
6. The differences between **leading** and **managing**
7. The importance of **interpersonal skills** to your own project success
8. The three levels of **integration performance**
9. Other references and resources:
   - *Navigating Complexity: A Practice Guide*

### Key Definitions

**Authority**: the right to apply project resources, expend funds, make decisions, or give approvals.

**Cognitive**: the mental processes of perception, memory, judgment, and reasoning.

**Competency**: the ability to do something successfully or efficiently.

**Context**: the set of circumstances or facts that surround a particular event or situation.

**Explicit knowledge**: knowledge that can be codified using symbols such as words, numbers, and pictures.

**Interpersonal skills**: skills used to establish and maintain relationships with other people.

**PMI Talent Triangle**®: the graphic representation of the ideal skill set for a project and program manager.

**Power**: the ability to influence people in order to achieve needed results.

**Tacit knowledge**: personal knowledge that can be difficult to articulate and share such as beliefs, experience, and insights.

## PROJECT MANAGER ROLES

In the course of managing a project, the project manager will hold many roles. Some of the most important roles (from PMI's *Principles of Project Management*, pages 178-180) include being a/an:

- **Integrator**, who produces the product with available resources within time, cost, and performance constraints
- **Communicator**, who interfaces with customers, stakeholders, upper management, project participants, and functional managers
- **Team leader**, who is a team builder
- **Decision maker**, who makes or ratifies all required project decisions
- **Climate creator or builder**, who resolves conflicts

**EXAM TIP**
Scenario exam questions may ask what the project manager should do based on best practices and principles that this chapter covers.

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The project manager's tasks and responsibilities include:
- Planning, scheduling, and estimating
- Analyzing costs and trends
- Reporting progress and analyzing performance
- Maintaining client-vendor relationships
- Managing logistics
- Controlling costs
- Handling organizational and resource issues
- Handling procedural, contractual, material, and administrative issues

Time and stress are two factors that can enhance or diminish performance. The project manager faces greater time challenges than most functional or operational managers. A delay of one or more critical tasks could delay the entire project; therefore, the project manager must be able to **influence** groups and individuals to get things done. The difficulty associated with assigning priorities for work can place project managers under continuous stress. Stress can be used as a driving factor in enhancing productivity, but long-term stress often leads to poor performance and ill health.

The common characteristics of a project manager's work environment are:
- Extensive contact with people, the project manager is an **integrator**, which requires intense interaction with people
- Fast pace, the project manager is under high pressure to deliver within the defined schedule and cost requirements, which often leads to working longer hours
- Risk identification and vigilance, the project manager must constantly look to the future for upcoming factors or triggers that could positively or negatively impact project deliverables

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## SPHERE OF INFLUENCE

Success as a project manager requires the ability to effectively work within the project team and outside of the project environment.

## The Project

The project manager is responsible to lead the team to meet the objectives of the project. It is not only about delivering projects on time, on budget, and at the appropriate level of quality, it is about:

- Meeting project objectives
- Meeting stakeholder expectations
- Managing tasks and resources within defined project constraints
- Communicating effectively to ensure success
- Using interpersonal skills to get the most out of every resource

## The Organization

A project is not an island. It is not the only activity being performed within the organization, nor is it the only activity being performed by many of the same resources. The project manager must understand that:

- Resources on the project have other duties and responsibilities
- Funds are not unlimited
- The timing of receiving or distributing deliverables can vary
- Organizational goals and objectives can change

It is important for the project manager to assess what is happening within the organization and adjust accordingly. For example, the project manager may be very good at influencing people within the organization, but if that skill impacts the success of a more important project, the impact could be catastrophic to the organization.

**EXAM TIP**

Within organizations, project managers must work proactively with each other to balance the various needs of projects. Developing relationships with other project managers and others within the organization helps to get project work done successfully.

Additionally, the project manager is a professional and should help to foster an acceptance of the value project management can provide to an organization.

Regardless of the reporting relationship of the project manager (see Chapter 2), the project manager strives to work effectively with all parties both within and external to the organization.

## The Industry

Project management is a skill that can come naturally, or can be learned. Regardless of how you arrived in this role, it is important for anyone holding a professional role to continue to refine and enhance their knowledge in the environment for which they work.

Staying abreast of the latest trends in your organizational and professional industry of project management is important to ensure project success. Project managers are trained to think ahead and assess opportunities and risks for their project—they too should assess the opportunities and risks occurring within their own professional industry.

When you achieve your PMP credential, it is important to continue your education by staying current as future editions of the *PMBOK® Guide* are published.

## Professional Discipline

Knowledge is so important to organizational success. PMI reinforces the importance of sharing knowledge and contributing to others through training and other professional outlets, such as PMI chapters, seminars, and conferences.

When you become a certified PMP, you will need a plan to maintain your credential. **Continuing education** for yourself and mentoring others are ways for you to give back to the profession.

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> **EXAM TIP**
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> Read closely PMI's *Code of Ethics and Professional Conduct* and consider what you can do to help your organization succeed.

## Across Disciplines

The *PMBOK® Guide* states "the project manager may serve as an informal **ambassador** by educating the organization as to the advantages of project management with regard to timeliness, quality, innovation, and resource management." This statement reflects the overarching belief that project management skills can help people in organizations succeed. The project manager can be an ambassador of this belief by demonstrating every day the good practices outlined in the *PMBOK® Guide*.

## COMPETENCIES

The *PMI Talent Triangle®* outlines the three pillars of competencies needed for project managers to succeed on projects and within organizations.

## Technical

Technical project managers know how to use the **knowledge**, **skills**, and **behaviors** outlined in the *PMBOK® Guide* within a project, program, or portfolio setting. Success requires that the project manager understands the importance and appropriate use of each of these tools in order to best tailor the technical approach to a project.

## Strategic and Business Management

To be a strategic project manager, one needs to understand the industry in which one works and the **good practices**, allowing delivery of optimal results.

It is important for the project manager to not assume that what worked in one project, one organization, or one industry will, by default, work within the current project, organization, or industry.

The project manager needs to thoroughly understand the environment in which he or she is working within and consult with others to maximize the business value of the project.

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### Leadership

Project managers are leaders of organizations. They are the individuals that help to transform a **vision** of the organization into a reality.

Leadership is the art of **motivating** a group of people to act towards achieving a common goal. Executives in your organization are leaders. Project managers are leaders in delivering the strategic objectives of the project.

In order to get things done, you must understand people. In each successive edition of the *PMBOK® Guide*, PMI has continued to increase the importance of leadership skills in successfully delivering on organizational strategy.

**Authority** and **power** are related, yet different. Authority is the right to apply project resources, expend funds, make decisions, or give approvals, while power is the ability to influence people in order to achieve results. Project managers cannot be effective with authority alone. A certain level of power, or influence, over others is needed.

There are two types of power a project manager can use: legitimate (positional) power or personal power. These common types of power are further broken down as follows (from Verma, *Human Resource Skills*, page 233):

- **Formal/Positional**: a legitimate form of power based on a person's position in an organization
- **Reward**: a legitimate form of power based on positive consequences or outcomes a person can offer; it can also result from personal influence
- **Coercive** (**penalty**): a legitimate form of power based on negative consequences or outcomes a person can inflict; it can also result from personal influence
- **Referent**: a personal form of power based on a person's charisma or example as a role model (an earned power)
- **Expert**: a personal form of power based on the person's technical knowledge, skill, or expertise in some subject (an earned power)

Other types of power include informational, situational, personal, relational, ingratiating, pressure-based, guilt-based, persuasive, and avoiding.

The project manager may experience **power** and **authority** problems for a variety of reasons, including:
- Power and authority not being perceived in the same way by everyone
- Poor documentation or lack of formal authority for the project manager
- Dual or multiple accountability of team members
- A culture that encourages individualism instead of teamwork
- Vertical or stove-pipe loyalties instead of cross-organizational structures
- The inability to influence or administer rewards and punishments

Leadership is not easy. Leadership takes **self-discipline**, it takes doing things through others, and it takes understanding and listening to know when to adjust a planned course of action.

Leadership understands that **politics** will play a part in achieving our goals. A competent project manager understands the political situation, the organizational situation, the people situation, and the tactical project situation and responds according to the needs, always keeping the eye on the end goal.

**EXAM TIP**

Leadership and management are not the same thing. Review Table 3-1 in the *PMBOK® Guide* to understand the differences.

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The *PMBOK® Guide* outlines six different leadership styles that a project manager can leverage when needed.

- **Laissez-faire:** hands-off and allows other to make decisions
- **Transactional:** focuses on goals and feedback and manages by exception
- **Servant:** demonstrates the willingness and ability to put others first
- **Transformational:** empowers others to be innovative and creative
- **Charismatic:** inspires others
- **Interactional:** combines transactional, transformational, and charismatic styles

Personality is another aspect that project managers must consider—not only of themselves but of the project team. Every interaction made within a project requires interaction with people. Not considering the various personalities within your project could be a formula for failure.

Many equate leadership with those who hold a senior-level title within the organization. **Leadership** requires creating a vision for your team and planning for and executing that plan to reach those goals. Included in the responsibility of leaders is providing support to ensure that the team has every opportunity to succeed.

Project managers are leaders and must use a variety of skills, including influence, to break down barriers and gain support, even without a senior-level title.

In order to manage projects successfully, project managers require many interpersonal skills. Some of the key skills for a project manager to know that will be discussed throughout this textbook, are:

- Communications skills, which include the ability to adapt to the audience to which you are communicating
- Leadership skills, which include the ability to see the big picture and use creativity and vision to help the team achieve its goals
- Decision-making skills, which include the ability to assess the current environment and develop ways for the team to reach consensus and make decisions
- Influencing skills, which include the ability to influence both the team and external parties when issues and conflicts arise to solve problems
- Political and cultural awareness includes the ability to understand and plan accordingly for various organizational political environments, as well as the international cultural differences present in current projects
- Team building skills, which include the ability to bring a group of individuals together to achieve a common goal, identify when skills of the team are lacking, and develop plans to fill those gaps

## PERFORMING INTEGRATION

Integration is a skill that allows the project manager to bring together all the different people and aspects of a project to ultimately deliver the results stated in the project charter. Integration takes place at three different levels—process, cognitive, and context.

### Process Level

Project management is a set of processes and activities that are performed to achieve project objectives. The *PMBOK® Guide* outlines the processes that should be performed on all projects singularly or iteratively throughout the project life cycle.

### Cognitive Level

There is no set way to manage a project. Projects create change, projects are new, and projects deal with different people. It is important for the project manager to assess the environment and apply their experience, insight, leadership, and technical and business management skills to achieve the desired business results.

### Context Level

How a project manager and the project team deliver has changed drastically over the years. New tools and methodologies require a continuous re-assessment of the context of the project, generally resulting in changes to how projects are delivered over time.

The level of **complexity** in projects has increased significantly over the years. A global workforce, a level of technology integration never seen before, and a need for constant innovation have increased the level of complexity project managers face. It is important for the project manager to understand where those complexities lie within the project and address them throughout the integration activities.

## SAMPLE PMP EXAM QUESTIONS ON MANAGEMENT PROCESSES

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1. All of the following are part of a project manager's sphere of influence, except:

   a) The project management industry
   b) The alignment of the project objectives and the business unit
   c) The industry your company works in
   d) The functional departments within your organization

2. You are a project manager on a workflow initiative that just completed. As part of your lessons learned meeting you ask the lead analyst to identify any of the uniquenesses in dealing with this client that others can learn from. This is an example of obtaining:

   a) Tacit knowledge
   b) Details on complexity
   c) Context on the project
   d) Explicit knowledge

3. You are the project manager on an operational change project. The goal of the project is to reduce cycle time by 20%. The business team members keep wanting to add steps to the process that do not appear to add any value and would impact your ability to reach the project objectives. You should:

   a) Tell the project team that the request is out of scope
   b) Update the project charter with the revised metrics
   c) Initiate the change control process to obtain approval
   d) Reach out to the operational manager to ensure project goals and expectations are aligned

4. You are working on a project that includes multiple vendors across five continents. The entire team, except for one of the vendors, has prior experience working together. You plan on using a laissez-faire leadership style with all but the one vendor. You would consider this project to be:

a) Complex
b) Common
c) Analogous
d) Situational

5. You are a new project manager for a startup software company. As you began your career there, you notice that the project management methodology is very informal. One of the first things you should do is:

a) Educate the organization on why a more formal methodology is needed
b) Establish a PMO in the organization
c) Nothing; if the process is working, an informal methodology could certainly be used
d) Communicate to the project team that they need to follow your proven methodology

6. The project manager is always responsible for:

a) Ensuring that the project is highly profitable
b) Hiring and firing members of the project team
c) Selecting projects that can be accommodated
d) Determining what processes are appropriate

7. You have a team where all of the functional leads have worked together before. They are very excited to work together again. What leadership style might you use?

a) Transactional
b) Laissez-faire
c) Servant
d) Transformational

Notes

8. You work in a matrix environment where your team members report to both you and their functional manager. The functional manager keeps setting up department meetings at the same time as your critical customer status meeting. The functional manager is demonstrating what kind of power?

   a) Persuasive
   b) Positional
   c) Punitive
   d) Situational

9. Guiding your team to work together and focus on what is really essential is achieved through excellence in:

   a) Interpersonal skills
   b) Management skills
   c) Integration
   d) Leadership

10. In discussions with the receiving organization of your project, their manager expressed concerns over the amount of change this project will cause. You should:

   a) Seek consensus
   b) Apply persuasion
   c) Collaborate with the receiving organization
   d) Help to satisfy the concerns

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## ANSWERS AND REFERENCES FOR SAMPLE PMP EXAM QUESTIONS ON MANAGEMENT PROCESSES

Section numbers refer to the *PMBOK® Guide*.

1. **B  Sections 3.3 and 3.5 – Initiating**
   Integration aligns the project objectives and the business unit. It is not part of the project manager's sphere of influence. Integration is a skill.

2. **A  Section 3.3.3 – Closing**
   Tacit knowledge is the personal knowledge that can be difficult to articulate and share.

3. **D  Section 3.4.3 – Monitoring and Controlling**
   The best course of action is to have a discussion with the operational manager and ensure that you and the operational manager are on the same page with the project goals.

4. **A  Section 3.5.4 – Planning**
   B) is not a type of project; C) is a type of estimate; D) is a type of power.

5. **C  Section 3.5.2 – Initiating**
   A project management methodology does not have to be formal or mature. The objective of any project is to satisfy the needs of the customer. Additionally, you should not jump to changing an existing process until you are sure it needs to be changed.

6. **D  Section 3.5.1 – Planning**
   A) projects don't have to be profitable; B) project managers may not have the authority to hire and fire; C) project managers don't always get to choose the projects they work on. Project managers do have the responsibility for integrating and tailoring the project processes.

7. **A  Section 3.4.5.1 – Planning**
   B) allows the team to make their own decisions; C) focuses on other people's growth and learning; D) empowers followers by being inspirational.

8. **B  Section 3.4.4.3 – Monitoring and Controlling**
   A) is the ability to provide arguments that move people; C) is the ability to invoke discipline; D) is gained due to the unique situation of the project.

9. **C  Section 3.5 – Executing**
   A) establish and maintain relationships with other people; B) are the ability to plan, organize, direct, and control individuals or groups; D) is the ability to get an individual or group to work toward achieving an organization's objectives.

10. **D  Section 3.4.4.2 – Monitoring and Controlling**
    In this example, the receiving organization has concerns so the project manager should not jump to change the mind of the organization. Instead, the project manager should work to understand the concerns and help to satisfy them.