



1



2

Agenda

- Personality Tools
- Building a Team
- Getting Team Buy-In
- Running a Project
- Examples

3

Learning objectives

- 🎆 Objective 1 - Utilize best management practices for delegating, mentorship, and running project meetings
- 🎆 Objective 2 - Develop framework for interacting with and leveraging individuals of all backgrounds
- 🎆 Objective 3 - Identify common communication challenges on projects and how to avoid them

4



Step 1: Building a team

5



Building teams around “fit” – good or bad?

- We’re most comfortable around people who are like us, but does that create the best performing project team?
 - Like-minded teams = groupthink, echo chambers
- Diverse teams...
 - Fill gaps and complement each other
 - Are more adaptable and resilient
 - Outperform like-minded teams

6

Data

- Diverse teams make better business decisions 87% of the time
- Teams that follow an inclusive process make decisions 2x faster with half the meetings
- Decisions made and executed by diverse teams delivered 60% better results

Forbes article: <https://www.forbes.com/sites/eriklarson/2017/09/21/new-research-diversity-inclusion-better-decision-making-at-work/>
White paper: https://www.cloverpop.com/hacking-diversity-with-inclusive-decision-making-white-paper/utm_campaign=Forbes&utm_source=Forbes&utm_medium=Forbes%20Hacking%20Diversity%20White%20Paper

7

Diversity vs inclusion

- Diversity refers to the variation in personal, physical, and social characteristics, such as gender, ethnicity, age, and education
- Inclusion pertains to the strategies and procedures organizations implement to integrate everyone, ensuring their differences coexist beneficially
- Diversity doesn't matter without inclusion...

You need **both!**

<https://resources.workable.com/hr-terms/diversity-vs-inclusion>

8

When building a team, consider...

- What roles are needed?
- What are the goals of the project?
- Is this a good project for someone to learn and grow on?
- Do you need an expert?
- What skills does the team have?
- What skills does the team lack?

9

Don't build your team around “fit!”

Build your team around the **needs of the project**

10

Personality tools

- Personality tools exist to help us understand our individual differences
- Allows for perspective on behavior, working style, etc.
- Provides a framework for understanding how others make decisions or react in various situations

11

Note: this slide has animations so is best viewed in PowerPoint.

Personality tools

- Enneagram
- SDI
- DISC
- 16 personalities

Enneagram



12



13



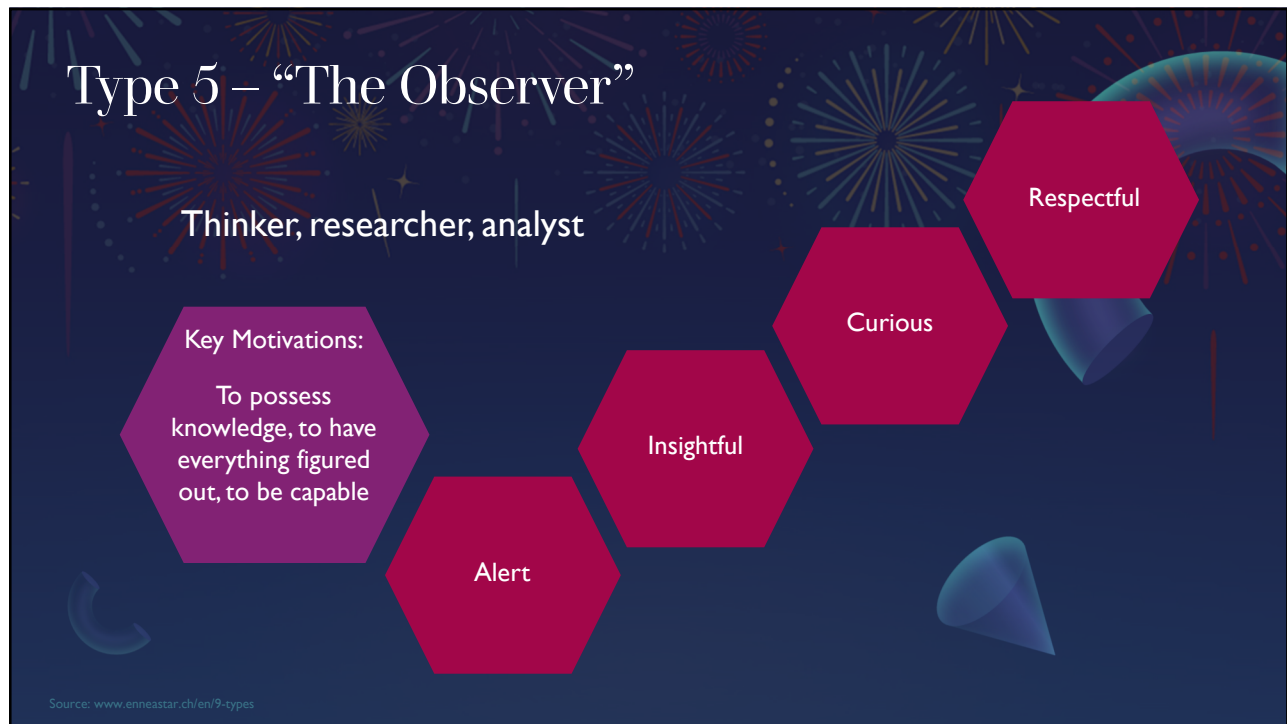
14



15



16



17



18



19



20

Type 9 – “The Mediator”

Peacemaker, team player, supporter

Key Motivations:
To create harmony in their environment, to avoid conflict, to go with the flow

Supportive

Stable

Trusting

Accepting

Source: www.enneastar.ch/en/9-types

21

TYPE 3, “THE DOER”

Dynamic, determined, achiever



TYPE 8, “THE FIGHTER”


Challenger, leader, protector



Source: www.enneastar.ch/en/9-types


22

Strengths



Brianna

1. COMPETITIVE
You strive to win against others.
2. FORCEFUL
You act with conviction, power, and drive.
3. QUICK-TO-ACT
You get things started without delay.
4. PERSEVERING
You maintain the same course of action despite obstacles.
5. PERSUASIVE
You urge, influence, and convince others.

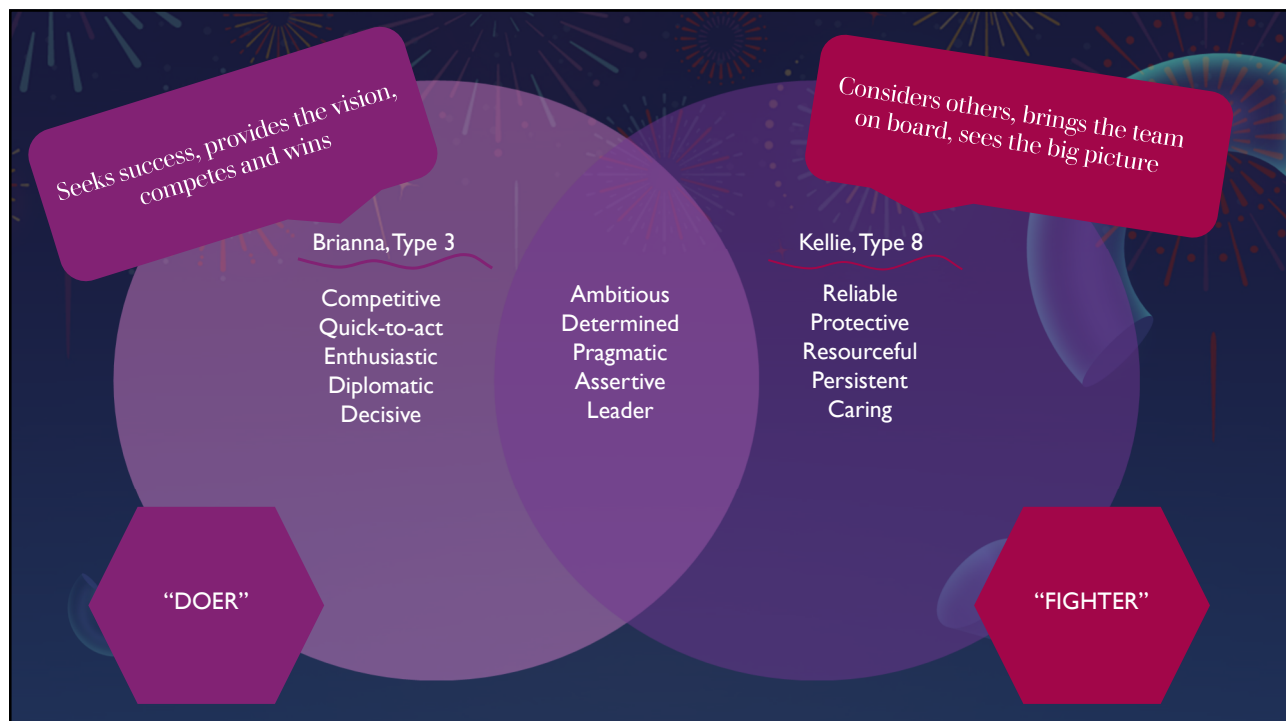


Kellie

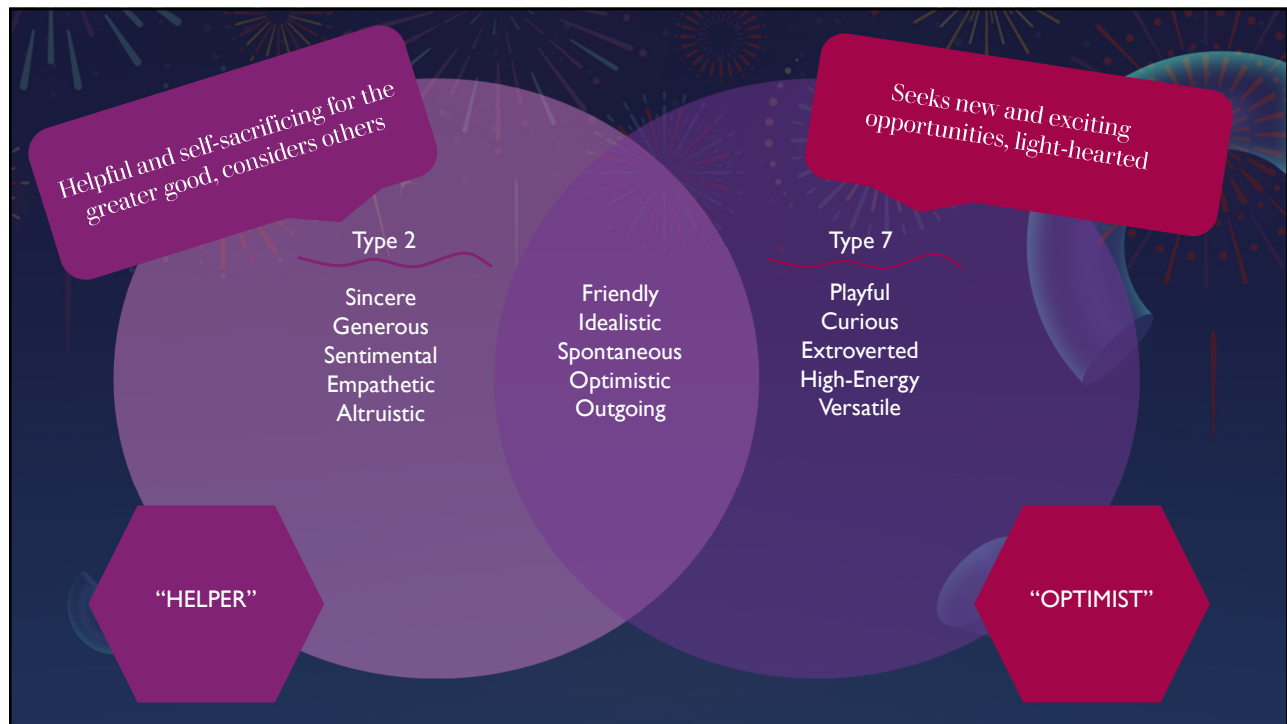
1. FLEXIBLE
Kellie acts in whatever manner is appropriate at the moment.
2. HELPFUL
Kellie gives assistance to others who are in need.
3. OPEN-TO-CHANGE
Kellie considers different perspectives, ideas, and opinions.
4. SUPPORTIVE
Kellie gives encouragement and help to others.
5. CAUTIOUS
Kellie is careful to make sure of what is going on.

Notice: We have 5 completely different top strengths! This is a good thing!

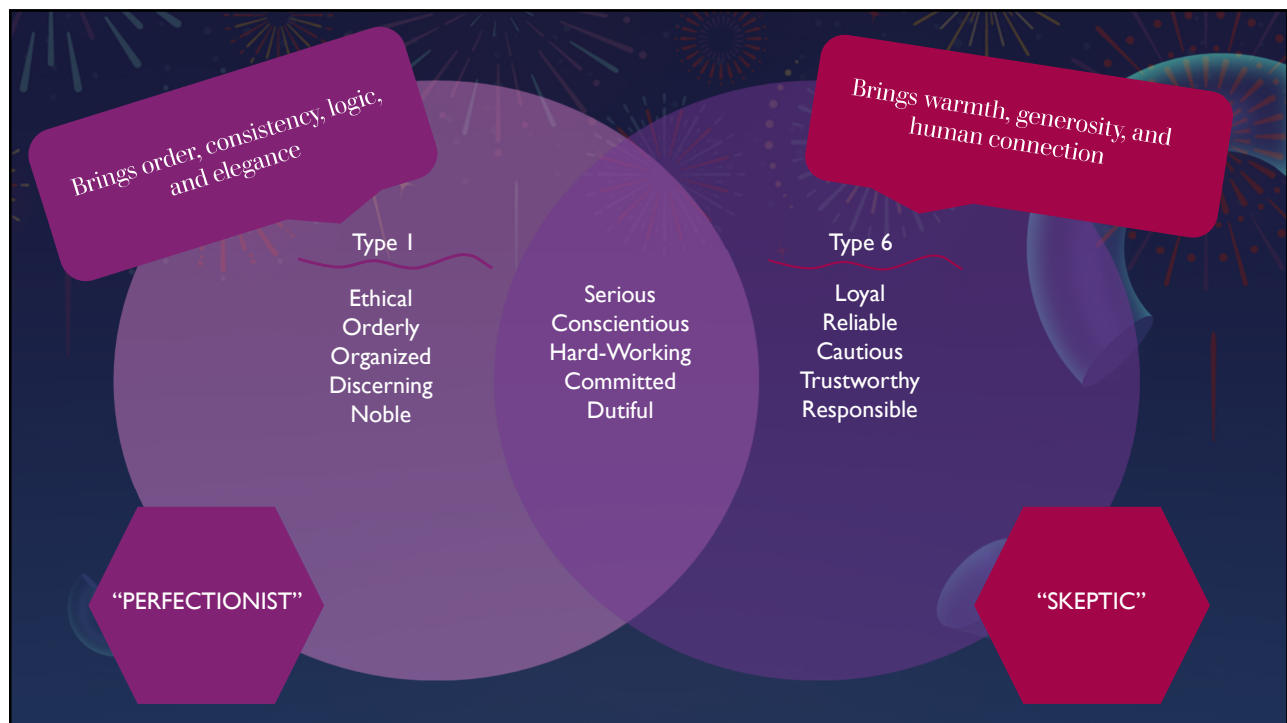
23



24



25



26



Find the **overlap** but leverage the **differences**!

27

Getting buy-in for a project

- Outline the BIG PICTURE goals
- Explain why you have decided to take on this project
- Articulate what you hope to gain
- Ask others to articulate their goals and aspirations

28

Project vision & alignment

- What are the hot-buttons for the client or project team?
- Why is this project important to you?
- Who will work on this project? What are their skills? Where are opportunities for growth?
- What are the target financials?
- What technical skills does the team already bring to this project? Where are areas of potential growth or innovation?



← review all this with your team!!

29

Step 2: Running the project

30

Project facilitation keys

- Individualized communication
- Mentorship
- Delegation
- Meetings

31

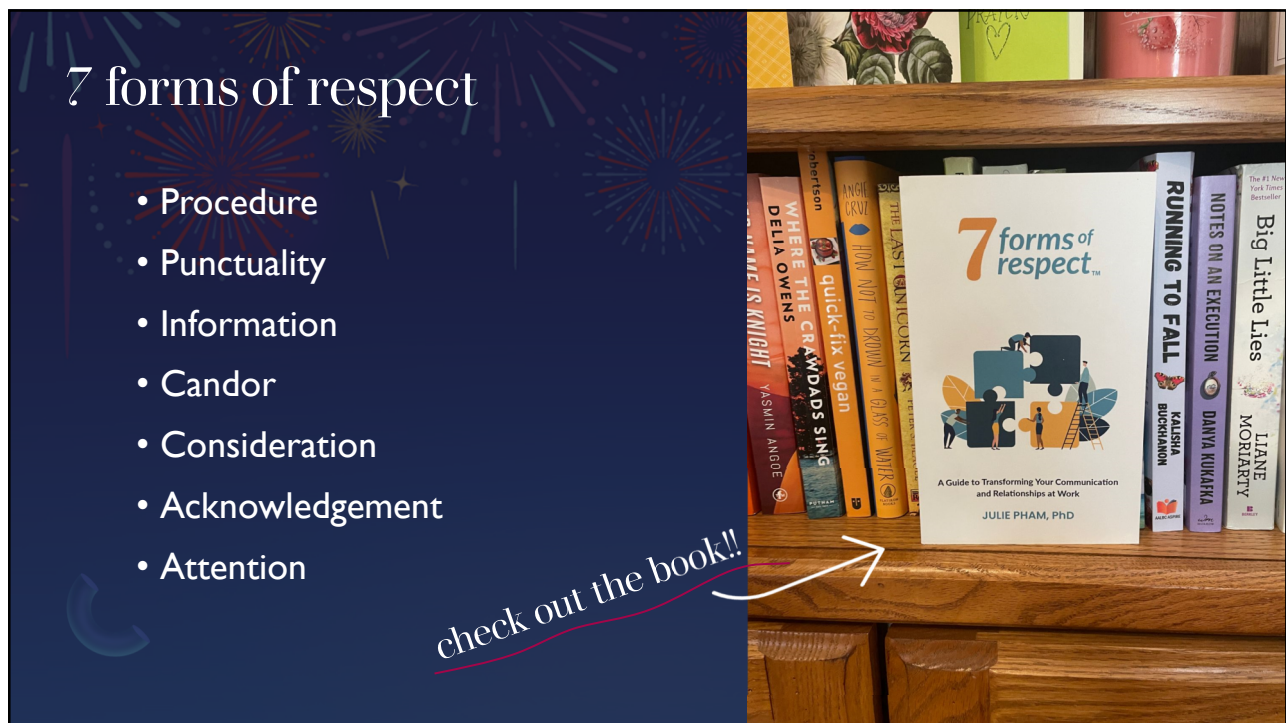
Common communication challenges

- Unclear lines of communication
- Assumptions
- Lack of feedback
- Differing motivations
- Passive listening
- Poorly written communication

32



33



34

Note: this slide contains a 2-minute video.

7 forms of respect

<https://youtu.be/4pSWrefqqGc>

We can interpret the same statements differently.

The diagram illustrates how the same person can be perceived differently based on context or interpretation. The central figure, 'The Boss', is shown in three different emotional states: neutral (top), disrespected (bottom left), and respected (bottom right).

35

Note: this slide has animations so is best viewed in PowerPoint.

Addressing communication challenges

- Unclear lines of communication
 - Establish goals and expectations; make sure to provide context so your team understands is relevant to whom
- Assumptions
 - Ask questions to clarify understanding (both yours and theirs)
- Lack of feedback
 - Encourage feedback and two-way communication - make sure you are listening
- Differing motivations
 - Consider their personality and communication style and compare it to yours
- Passive listening
 - Listen for understanding, not to think of your next comment or response
- Poorly written communication
 - Opt for non-written communication first or in addition to written communication to ensure clarity and understanding

36

Ask what your team members need!

- Do you like receiving the agenda and materials ahead of the meeting?
- How do you like to receive feedback?
- What's your preferred communication method?
- How often would you like to check in?
- What's important to you on this project?
- Mentor your team as needed!

37

Benefits of being a mentor in the workplace

- Grow your leadership skills
- Build emotional intelligence and communication skills
- Strengthen your understanding of a topic by teaching it
- Get an understanding of how the organization is doing
- Bridge the generational gap
- Get a different perspective

38

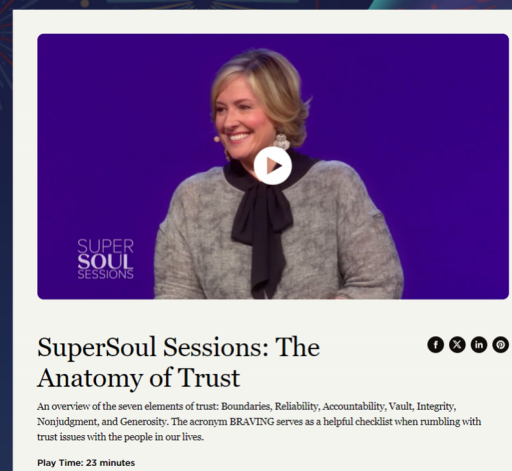
Keys of mentorship

- Foster a sense of belonging and inclusion
 - Remember – find the overlap but leverage the differences!
 - What is each person bringing to the table?
- Don't tell them what to do – ask questions to help guide them to their own conclusions
- Trust is critical!

39

Anatomy of trust from Brené Brown

- 7 elements of trust: BRAVING
 - Boundaries
 - Reliability
 - Accountability
 - Vault
 - Integrity
 - Nonjudgment
 - Generosity



check out the video!!

<https://brenebrown.com/videos/anatomy-trust-video/>

40

Tips for being a successful mentor

- Remember your strengths and weaknesses
- Be a good listener
- Set objectives clearly
- Build trust
- Display impartiality, objectivity, and keep discussions confidential
- Encourage your mentee to take risks, take initiative and be creative
- Guide, don't drive

41

Dos & don'ts of mentorship

Do...

- Listen and remain neutral
- Be punctual and committed to sessions
- Help clarify mentee's goals and objectives
- Inspire confidence and assertiveness
- Keep professional boundaries

Don't...

- Judge the mentee
- Play the role of a therapist or counselor
- Give 'answers' to problems or resolve conflicts
- Define a mentee's goals and expectations
- Give negative feedback

42

Delegating

- Get buy-in
- Be respectful: ask if they have the time and interest to complete the task(s)
- Be clear in your expectations
 - When does the task need to be done?
 - Who will review the final product?
 - How much time should the task take?

43

Hold them accountable

- Check in regularly to make sure they're on track – or, even better, ask THEM set up a recurring check in with you (teach them to be accountable)
- When you review their work make them correct it – allow time in your process for this step, it's a very important part of the learning process
- Hold YOURSELF accountable! Be timely in your review of their work – be respectful of their time and efforts

44

Meetings

What makes a good meeting?

Are there meetings you like going to – why?

What makes a bad meeting?

Are there meetings that you dread – why?

45

Meetings

Could have this been an email?

- What's your intention? Consider these for the meeting as a whole, then more specifically for each agenda item
 - Share information
 - Make decisions
 - Achieve alignment
 - Discuss ideas & feedback
- Consider what is appropriate for large group discussion vs what should be one-on-one or small groups!

46

Meetings – for the team lead

- Come prepared with an agenda or talking points. What goal are you trying to achieve?
- Inclusive language, prompting folks to speak
 - “_____, what do you think about this?”
- Steer the conversation
- Let team members know what to prepare for ahead of time
- Following up with meeting notes and/or next steps

47

Meetings – for the team member

- Understand why you're there. If you don't know – ask!
- Come prepared by thinking through your part
- Take notes and pay attention to action items

48



49

Our Team

- We are all different!

PEOPLE

PERFORMANCE

PROCESS

50

Our Strengths

Sociable

Caring

Helpful

Supportive

Methodical

Ambitious

Quick-to-Act

Competitive

Inclusive

Sociable

Flexible

Open-to-Change

51

Project Examples

Notice the Behavior

Identify the Cause

Change the Approach

Contractor became defensive when asked certain questions in meetings



They don't like being put on the spot



Let them know what will be asked ahead of time so they can prepare
OR
Provide them with an opportunity to follow up after the call

52

Project Examples

Notice the Behavior

Client/Project Manager would make quick decisions and stick to them, even without having all the information. Felt challenged when other suggestions were made.



Identify the Cause

They want to show project ownership.



Change the Approach

Instead of phone calls, send emails containing ALL information, including alternatives and their impacts. Take on a more advisory role and allow them the opportunity to still make the decision

53

Project Examples

Notice the Behavior

Coworkers seemed hesitant to provide feedback to me when I would present an idea, even though I was presenting it with the purpose of gathering feedback.



Identify the Cause

I was talking about things in a way that made it seem like I had already made a decision, and my assertive tone wasn't inviting any input.



Change the Approach

Begin conversations by saying, I'm looking for your input on this and it's just an idea right now; ask again at the end, emphasizing that I value people's opinions.

54

Project Examples

Notice the Behavior

Identify the Cause

Change the Approach

Felt frustrated that people were chatting a lot at the beginning of meetings



Some people really need that time to connect with other project team members before diving into project agenda topics



Build in some time for personal conversations even in professional settings

55

Thank you!

brianna.navarro@kpff.com

kellie.jaenicke@kpff.com

56