Managing Like a Boss

Develop Yourself into a Leader

A PRACTITIONER'S VIEW

LES J. GOODWIN

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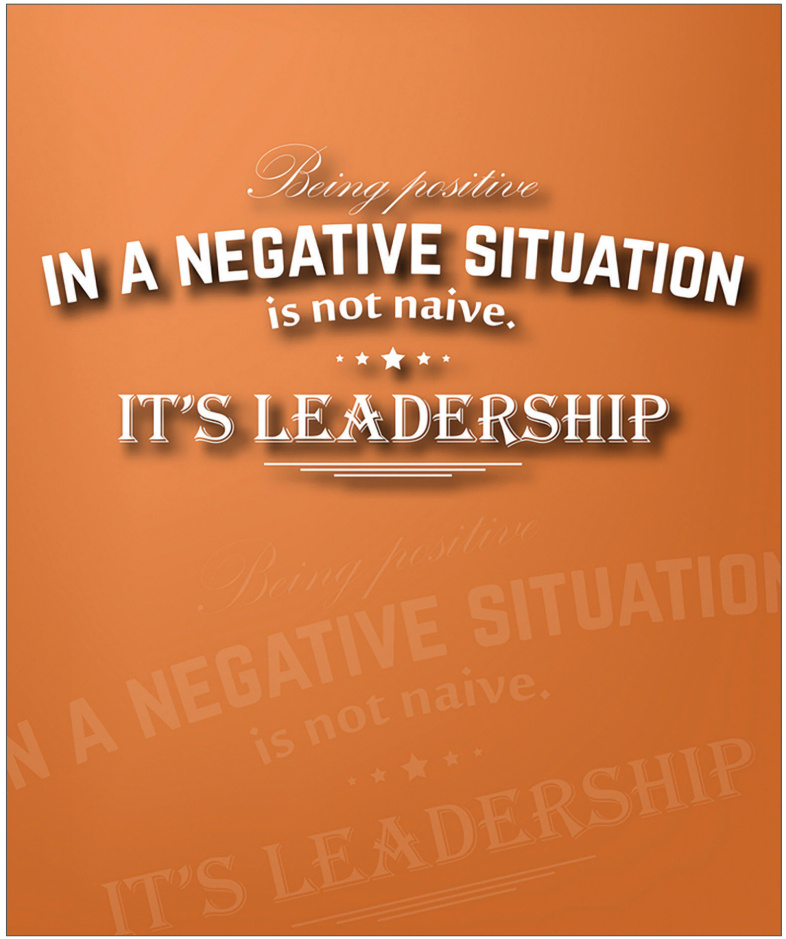
DEDICATION

I want to thank all of the people who supported me in all aspects of my development as a Business Manager. Life is full of ups and downs and lessons of every kind, but the people who cared for me have always helped me stay the course.



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PREFACE

It's my belief that OPPORTUNITY, EXPOSURE, and MENTORSHIP create a formula for LEADERSHIP, which is the only route to a successful business, *and* to a proud LEGACY for the "boss".

But the following chapters are more of a musing than a formula. They are a collection of articles I wrote and posted in 2015 in an attempt to bring more awareness to all the different aspects of being in charge. Having just recently retired, I felt a desire to look back over the course of my career in corporate America and share what I'd learned about Business Management, from the new perspective of being my *own* boss. I am not really laying out steps or a program to follow, but I'm touching on a few of the topics that I feel you will need to learn more about, using stories from my own life to illustrate those concepts, and hopefully, inspiring you to think and take action to further foster your success.

By presenting my thoughts on OPPORTUNITY, EXPOSURE, and MENTORSHIP, I am priming you with all the tools for great LEADERSHIP—but I am open to pushback and criticism on my ideas. I confess, I myself do not possess all the traits I emphasize here, but by becoming aware of them in myself and others over the years, I know I was able to develop a positive LEGACY at my company.

You don't need to be an actual boss, or even want to be one, to read this book and get something from it. This information will also help people who work *for* others to better understand the differences in the training and approach of many Managers. Personally, I was always more the type of employee to want to make my bosses look good, than to want to rise the ranks to become the "big boss" myself. This was my elective choice: to remain under strong leaders and to learn more and more from each of them. In truth, I have learned more under bad bosses than under good ones, as you'll see from many my stories. They pushed me beyond my abilities to perform at levels that surprised me. We all know that life has its own plans for each of us, and we must take responsibility for our careers, regardless of whether we work for a dream boss, or a petty micromanager. I *did* try to focus here on the importance of

self-improvement—you can, in any position, become a solid, people-caring, and *honest* leader who inspires people to fulfill their dreams.

Again, for those of you who aren't striving to be the boss—just a more aware employee—this book should help you better assess the people you work for, allowing you to determine the level of respect, loyalty, commitment, and trust you might have in following them. For those of you who are already in management, or who want to become the most effective bosses possible, I challenge you to read this book with an open heart and mind. Challenge yourself! It isn't about agreeing with me or not; it's about you being willing to question your past communications, reactions, and other behaviors in order to become the best boss you can be.

I also need to thank all of the wonderful bosses, mentors, staff, and friends who supported me over the decades to help me rise in my career where I wanted to, allowing me to be forthright with my decisions, and giving me the devotion of their aid. A special thanks to my co-writer, Shannon Constantine Logan; to our editor, Madeline Schussel; to our designer Dana Marotta-Russo; and to Marcia Mosko of Burnett Print Group, LLC for helping me to make this book happen. These women brought talent, insight, and dedication to shape my writing, and my thought-processes. I am truly blessed to have had their help.

Please, enjoy this book. It is my dream that bringing these challenging topics to your attention will make a positive difference in your life, and in the lives of those you interact with—especially at work. I hope especially that women and people belonging to an ethnic minority who read this will see it as a guide to finding success in business, in spite of the many obstacles before them. The obstacles may not go away any time soon, but your awareness of how to play the game of business by developing a sturdy game plan should give you a better chance. With any lot in life, we can learn how to bring the best aspects of ourselves to our work, and how to become visible as worthy to those who can advance us.

Whoever you are, always look to your own passions and follow them; if you ever find you've lost your way, make a move to change. Don't be afraid to reinvent your career, or to help yourself or your boss to become a better leader. Without passion for what we do, we can have no hope or strength to continue doing it.

MANAGING LIKE A BOSS

Develop Yourself into a Leader

PART ONE

Opportunity

Seize the Opportunity to Change Your Business, Your People, and Yourself

CHAPTER ONE

Getting It Done through Project Management

A great opportunity to develop yourself into a leader presents itself with the very first project you are called upon to manage. In truth, this will be your startup challenge in managing major *changes*—to your business, to your colleagues and employees, and to your own leadership style. Knowing how to structure and put in place a process, and then to *own* the completion of a project, is key to meeting deadlines and budgets; this, in turn, is key to the success of your company. As you'll see in the three chapters that follow this one, it doesn't matter what type of management you're doing or what type of manager you are—no one can get the job done, and get it done well, without strong Project Management skills.

My goal in this chapter is to open your awareness to the multitude of ways that a Project Manager—and at times, your proper support of him or her—brings the likelihood of success to projects. Before we dive in, let me offer a simple definition of **Project Management**: it is the activity of planning, motivating, and controlling resources and procedures in order to achieve a specific goal. What a Project Manager does is divide his/her attention between tasks and teams or individuals, while monitoring interactions, financials, progress, and the overarching dynamics of Change Management (which we'll explore more in Chapter 2).

Project Managers can come from all different areas of a business—they could be internal Analysts, or they could Practitioners from the Operations or Technology departments. They could be moving up in their careers to Chief Operating Officers or Senior Management roles. In preparation, any of these

people can take Project Management courses at online universities, or through other specialized training programs. (Most of the Project Managers I've interacted with were trained in "Six Sigma" methodology from General Electric.)

Strangely, my background as an Executive was void of any Project Management skills until much later in my career, and I wish I had stumbled into having these years earlier. I never did get formal training in this area, but I was eventually blessed to work with several (and one very special) highly-disciplined and seasoned Project Managers. I am incredibly grateful to them for enlightening me on the different aspects of their processes, which helped me learn to better organize and structure my own business plans.

Let me tell you the story of one particularly memorable Project Manager who I had the pleasure of working with. We were updating an older website for one of our departments, and the project was tricky because, on top of the feature improvements the company wanted, we had the added pressure of needing the website to conform to the company's protocols for security and reliability. As an Executive Manager, I tasked my Manager to collaborate with two other Department Managers to get an assessment together for the project. While I promised my Manager enough financial support, I wanted to make sure we had the resources and commitment to get it done in a cost-efficient and timely manner.

When the assessment was presented, I agreed to move forward with the project. The two Department Managers had assigned a Project Manager to prepare a plan for completing the website. I hadn't yet met her, but as it turned out, she was very detail-oriented and had strong people skills (more on this killer combo in Chapter 3). The countless hours they had all worked on scoping out, designing, testing the functionality of, and even picking pictures for the website was tremendous.

Early on, the Project Manager was getting some pressure from her Department Manager to get me to sign the project document, which would certify my promised financial commitment (since we'd only made a verbal agreement so far). I'd received the document, but I had been too busy to sign and return it. Despite several reminders from my assistant—prompted by the Project Manager—it had sat on my desk for days, and worse, I kept forgetting to return the Project Manager's call.

This is when the resourcefulness of this manager really took the spotlight. She orchestrated a last-minute face-to-face meeting through my assistant to get me to sign the damn document. My assistant literally came to my door, told me I had a guest, and as fast as that, the Project Manager made her way into my office and walked up to my desk with the document. Although I hadn't met her yet, I immediately knew who she was and what this was about. I said, "Let me see it." Then I turned to the signature page and signed it. I'd reviewed it earlier, so I already knew the details.

What she didn't know was that my Manager, who spoke very highly of her, had been encouraging me to meet her. Here was the perfect opportunity for me to watch her in action, dealing with a difficult manager: me. This Project Manager was known as the "soft hammer" because she had perseverance, and she would push you to do something, but you couldn't *feel* it. There was no retreat in her, but she never rubbed people the wrong way. Later, when we'd gotten to know each other better, she confessed she thought I was a jerk at the time. I simply thought her tactics were surprisingly effective. To this day, we laugh about it.

Her presentations to the group (I would barge in from time to time) were always well prepared, focused on the results, and delivered with a smile of confidence. All eyes are always on the Project Manager, and one of the most important traits he or she can possess is to never let anyone see fear. If a Project Manager loses the confidence, respect, and loyalty of employees and/or superiors, the entire project can be lost.

It's worth reiterating that **people skills** are key to the success of a Project Manager. All the training and discipline in the world will be a complete waste if good social qualities are not exhibited. The Project Manager on the web project had this art in spades.

The new website turned out to be a success; we finished early and under budget, thanks very much to our Project Manager. Had we not had someone with the same professional ability to perform under pressure—and to take pride in finishing the project—it might not have been accomplished.

Managing Project Managers

But this chapter probably won't teach you how to be a good Project Manager; there are tons of resources online for that. More interesting to me are the ways that you can be more aware during the process of *dealing with* Project Managers from the ranks above. To pull your weight—and to learn your own essential management lessons—here are several questions that you might ask yourself when preparing to interact with a Project Manager:

- Can I explain the project vision? How can I expect a good plan if I cannot explain the end product?
- Have I remembered that timing and other expectations are critical? Time is money and the transformation process is laden with possible delays and changes.
- Are my people reliable, competent, and available? Project Managers have a unique knowledge of the capabilities of individuals and can tell me whether I have what I need to succeed.
- Does my staff understand the necessity of having a Project Manager? If not, I must train and educate them to participate, and not hinder, our projects.
- Am *I* an obstacle to the Project Management process? My style of management and my *own* people skills play a large factor. It all starts at the top.
- Am I delegating enough? Holding on to every detail will hinder the process.

Knowing when to introduce a Project Manager into the process is also essential; it's best to bring him/her in right from the start.

During my 36-year banking career, I've been involved with many acquisitions. Early in my career, I worked for a large 40-plus branch bank that grew through acquisition 'projects', and I observed the effects of poor execution so many times, I lost count. This bank's poor communication and ineffective Change-Management Plans clearly had an impact on employees and customers, as well as on operational integration.

Later in my career, with a larger bank, I watched as the company bought 40 branches from an even larger national bank. Fortunately, the structure of this acquisition was more planned out than those at my previous company had been, and the staff we acquired had more experience than we did at my current bank. We still lacked much-needed Project Managers on our end, but the larger bank had enough expertise to craft an effective Communication Plan to help the process along.

Much later, that same bank finally engaged the expertise of Project Managers to implement and guide the changes needed to complete its acquisitions. It created a Project Management Office (PMO), and what a difference it made! The hours of research, planning, conference calls, and countless revisions the office handled—I was glad to be on the outside, but even gladder it existed, at last. It was like watching Grand Central Station. No matter who you were—a Practitioner or a Strategist, a Staff Manager or an Executive—you were aided by the PMO. I had gotten a taste of its processes from some earlier projects at the company, but I'd never seen anything handled so well as this. The PMO independently fought a full-scale war—with the bank's reputation on the line—against both government and internal financial timelines, in order to complete acquisitions with as few customer casualties as possible.

There are so many projects that require Project Management methodology; they don't have to be big, expansive undertakings, like acquisitions. I've learned a lot about participating and cooperating with Project Managers on smaller projects, too. When you're helping a Project Manager, whether you're a support person or a manager yourself, you have to understand your role. If you're staying reliable, engaged, and relevant, then you are adding value, and a Project Manager will communicate this up to Executive Management (whether that's you or someone above you both). Likewise, if you don't

understand what role you play, or if it looks like you're just barely showing up, then you aren't bringing value, and your failed efforts will also get communicated to your bosses. On a project of any size, you must be prepared to make management easier for everyone.

I always say to bring your "A" game when you go into a meeting with Project Management. They are expecting it, and they can easily see when you're not giving things your best effort. Upper Management frequently asks Project Managers for feedback as to whether all participants seem engaged. Remember, this is ultimately about money. Don't waste the company's resources.

It is easy for you or someone above you to negatively affect a project by adjusting the process midstream—perhaps, derailing it due to another, undisclosed agenda. I am referring to the times when a hidden motivator like pride, arrogance, greed, or incompetence distorts the Project Management process, resulting in poor decisions and, ultimately, a failed project.

At the end of my banking career, as an Executive, I witnessed one of these interferences playing out during an acquisition. My own staff, the Strategy Department, the Project Managers, and the other internal teams had all embraced the process from the very beginning, moving forward with excitement about increasing our profitability and sustainability. Even with this fortuitous start, power struggles among the Executives loomed and inevitably interfered, causing unforeseen delays and distractions.

In this scenario, you can detect a hidden agenda if you're watching for one. When there seems to be a lack of open communication or transparency from the Executives, there are often backdoor adjustments and compromises being made in which people who are left unaware will be directly affected. The Project Manager will then be confounded by erratic communications from above and have to constantly readjust the expectations of the group. These types of distractions cost the project a great deal in the loss of valuable opportunities, productivity, time, and money, too. Equally bad, they take resources away from other important projects and cause deep frustration within the organization as a whole.

On another project, years prior, Executives used a "Go Between" person to act on behalf of them in order to sway the project without being directly or visibly involved. Talk about hidden agendas! This "Go Between" asked me to consider advancing a strategic plan to expand into a new market segment. The original

plan had budgeted for several staff and a manager, and the Executives were really just trying to sidetrack us while a new budget cycle approached in which they could 'realign' (fire and hire) that staff.

So, one day, the "Go Between" came into my office to talk about the newer initiative. Within seconds of him speaking, I heard a little voice in my head saying, "They're trying to alter the timing and resources of the plan." He suggested I dilute the group's efficiency by making an existing manager and two staff multitask, instead of hiring the requisite additional people. The "Go Between" wasn't a business manager, so I knew the message was actually coming from the Big Boss. I sat back and listened, and when he had finished, I said, "Go back and tell her no."

"I will not proceed in that direction without a fully focused team. We will not move forward until it's all ready to be executed as we originally planned."

I was known for my pushback, but he knew that I was just calling it as I saw it. *All* of the initiatives on the table had to be considered relative to one another in terms of dividing up resources. Picking the right time to execute each project was vital. Often, we all go after the same resources at the same time, overusing them, burning them out, and forcing all missions to get scaled back impossibly.

KEYS TO SUCCESS *Chapter 1 Review*

- **Project Management** is the activity of planning, motivating, and controlling resources and procedures in order to achieve a specific goal. Whether you *are*, you are *overseeing*, or you are working *for* a Project Manager, you need to be able to hold yourself accountable for your specific contribution to the project.
- First, get a survey of your staff and support **resources**, keeping an eye out for hidden issues or concerns. There are often weak spots overlooked at the outset, usually because we neglected to ask about them.
- All projects require adjustment. Make sure you are ready for **change**!
- Ask yourself if you are open to learning the process, and to figuring out *when* and *how* you'll be adding **value**. If I'm on the project, I know I am needed—but I need to also know my place.
- You must see your part in the **bigger picture**. Don't come in with a narrow view.
- Are you willing to attend meetings to talk through the important steps? So many people miss the **conversations** that were crucial in helping to move things forward.
- Always ask your staff to participate in the project, even if they are not key players. It'll be a great development **opportunity** for them, too! If they cannot participate, you should offer to teach them what you learn.
- Get ready to manage **expectations**—your own, and those of others you are responsible for. There are so many unknowns and uncertainties. Expectations must be formed, be they good or bad.
- Above all, start practicing good **people skills** during your interactions with (or as) a Project Manager. It's likely there will be many who *won't,* so you *have* to do your part in this area.

I hope this chapter has expanded your awareness of the importance of Project Management. I challenge you to clearly recognize the value Project Management adds to any business, and to use it to maximize your opportunities to accomplish great feats.

CHAPTER TWO

Why Change Management is About People

Change does not come easily, as many of you already know. There are countless books on the topic of change, and there is no formal training on how to master it. But as a seasoned—and retired—practitioner of the art of implementing large-scale structural changes in the business world, I know that mastering this process plays a vital role in the future success of any company.

"**Change Management**" is roughly defined as the process of transforming individuals, teams, and organizations into a future state. There are several issues that can cause a company to initiate Change Management, including a move at the top (such as the loss or addition of an Executive), some other form of corporate reshuffling, a governmental or regulatory shift, economic fluctuations (like a recession), or even environmental or social factors that are affecting a certain marketplace. Sometimes it's a **crisis**, like when there's an urgent need to create more revenue, or when the core team's performance has failed to deliver an expected result. Other times, companies just **evolve** and expand and find that, over the years, they need to redefine what they do or how they do it, including reassessing current employees to see who fits their future needs. In any of these cases, companies must reevaluate their paradigms and begin to catalyze change.

In any of these cases, changing a company's business model deeply and directly affects *people*—and their jobs. This effect tends to be more severe than it can be under mere Project Management, when sometimes, job-related changes occur in the pursuit of one particular goal. Still, if someone has mastered Project Management, it is likely he or she will be able to execute a Change-Management Communication Plan that better appeals to the people in transition.

Successful changes at work, whether on a project or on the entire infrastructure, have a lot to do with trust; the employees, managers, and owners all have