

# PROJECTS AS CONVERSATIONS

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**Tobias Fors**

**How can we describe what a project is? How do we start projects off in a good way, and to what degree can we predict a project's outcome? Tobias Fors approached author and consultant David Schmaltz with a couple of questions on the topic.**

Ever since I entered the software business some years ago, I've been puzzled by what I've seen in projects, big and small. It seems that what we want projects to be and what they almost always are, are two very different things. A lot of people are bothered by this, and try to do something about it. That could be great, were it not for the fact that many of the things we do to improve projects only seem to make things worse. We attempt to go from chaotic to disciplined, only to realize that we've created a community of frustrated co-workers, eager to leave our companies in search for something less stressful. We try to use inspect-and-adapt methods, only to discover that people are not always prepared for what they find when inspection occurs.

Does it have to be this way? Of course not, says David Schmaltz in his book *The Blind Men and the Elephant*. We can learn to work together in more fruitful ways than we are used to. He even has a few ideas about why it's so easy for us to end up in conflict rather than with the results we desire.

Now, I really respect David's work. In short, I think he writes great stuff, so I was a bit nervous when contacting him to see if he wanted to talk to me about projects. I figured the best way to handle the situation would be to just tell David about how I felt, and take it from there. In the end the combination of my slight insecurity and David's willingness to accept my trembling invitation even kicked off our conversation.

**Tobias:** When first contacting you, I noticed that I felt insecure about whether it was appropriate of me to express my own insecurity about the end result of our interaction. This time, I chose to open up and tell it like it is, since I thought that would serve us best. However, very often in business, exposing insecurity would be avoided in order to convey a sense of “professionalism”, of “he sure knows what he's doing”, or “otherwise we won't get the business” or “won't get to start the project”. The result: we start off by avoiding talking about our insecurities, and end up “surprised” when problems emerge. Can we learn to avoid this? Can we learn to both have the cake (talk about risky issues) and eat it (continue to work with each other after having talked about risky issues)?

**David:** We've started beautifully! You started this conversation by extending an invitation, which I both accepted and declined. I said I might speak about how human interaction affects projects, but that I did not consider myself to be an expert on agile methods, just human ones. You responded by disclosing that you were really hoping I'd focus on human rather than agile. This is exactly the pattern present at the start of every real conversation - and every real project. Invitation, followed by at least a partial rejection of the invitation, followed by the recognition that the amended acceptance is closer to what the inviter really wanted. The pattern is not always as straight-forward as it was in our interaction, but acceptance often emerges from this dance. There is for me, always, a sense that I shouldn't amend the invitation, that I really should go along, if only to get along at the beginning.

But I remember my responsibility to the conversation, if it is ever to become a real conversation, and remember to feel the fear and amend the invitation anyway.

**“I have always felt that sense of obligation to just accept the invitation and go along”**

This pattern is one reason why I say that projects are conversations. I employ this metaphor, rather than the common “scripted performance” metaphor, because I have always felt that sense of obligation to just accept the invitation and go along, though all of my experience informs me that if I do not consider and amend the invitation at the beginning, no one is likely to discover what the real intention behind the invitation might have been. Remembering this pattern encourages me to speak up and amend from the earliest moment of engagement.

One of the key principles we teach in our Mastering Projects Workshop is that projects always start as a Bright Idea, an aspiration. Bright Ideas are attractive, seem eminently achievable, and seduce us into engaging with them. Seductions rarely become lasting,

meaningful relationships, so it is each participant's responsibility to judiciously inject a little disappointment into the Bright Idea at the start. This doesn't necessarily mean just rejecting the idea. The judicious part might take the form of a "yes, and" or a "yes, but" rather than a flat out "No!" I say this is each participant's responsibility because of another key principle of projects. Each project is born with a fixed amount of disappointment imbedded within it. The only rule about this disappointment is that it all must be dispersed before the project can end. It can be deferred until later only at the cost of mobility. Each deferred opportunity to level by amending creates otherwise unnecessary baggage which must then be carried further and ultimately discarded. We encourage agility when we discard potential baggage as soon as we recognize its presence.

How do we discover what's baggage and what's not? We make these distinctions in conversation. The clue for me is that feeling you described, that sense that you might be putting yourself in grave danger by opening this can of worms at this time. If you respond by posturing and posing, pretending that you know and are supremely capable, you forfeit your power for a wasting, short-term appearance of being powerful. The alternative, feeling the fear and speaking anyway, is not a sure-fire strategy for acceptance. You might stumble into injudicious comments. The best anyone can do is try to level the playing field here, to invite a peer-to-peer conversation. The amendment to the invitation is not a power struggle, but an invitation to become peers in the pursuit of the Bright Idea. This counter invitation might be rejected or further amended, and this inevitably results in a conversation - or not.

My experience tells me that if this dance fails to initiate a conversation, this indicates that the project never could have succeeded on anything like human terms. It could have become a death march, where one acquiesces to another, forfeiting their best judgment. It could have become a scripted performance which could not attract an attentive audience. It might have even succeeded in achieving its stated objective, but no one will feel much like celebrating at the end.

**"It might have even succeeded in achieving its stated objective, but no one will feel much like celebrating at the end."**

While this idea that projects are conversations might be crucial at the beginning, its full utility emerges as the project unfolds. When do the requirements become definite? Each requirement is rather like the initiating Bright Idea, an invitation which might need amending as the context shifts before the real purpose behind it becomes clear.

Hal Macomber and Greg Howell of the Lean Construction Institute use the term “responsibility” to fully acknowledge that each participant has the responsibility to renege on earlier agreements at the earliest responsible moment, at that moment when their guts are screaming that this can’t be achieved as envisioned. Each must be responsible in order for the “flow” of the effort to be preserved.

I call this an ethical responsibility, and frame it as the first of the blind-men-around-the-elephant’s dilemmas. Each must acknowledge their own blindness and the blindness of those surrounding them in order to “see” the elephant before them. We engage in conversation not because we know how the interaction will turn out, but because we do not, cannot know. If we knew how the conversation would actually end, we’d have no motive to engage in conversation. Our certainty (virtually always unwarranted) encourages us to follow the script. Our full acceptance of the uncertainty encourages peer-to-peer conversation.

**Tobias:** Let’s talk about predictability. I’ve sometimes seen you convey an admonition to your reader: don’t accept the concept of predictability. In our personal lives, I’d think many would acknowledge that few things turn out exactly the way we planned them to. So why does it seem like we’ve come to expect more or less full predictability in projects?

**David:** I have a curious relationship with predictability, as I’m sure most every veteran of project work has. I don’t think I admonish people to reject the concept of predictability, but I do advise them to carefully consider their relationship with predicting. Predicting is essentially surveying without benefit of territory. It has more to do with how we characterize the unknowable than how well we know the unknowable. It is imagining, “projecting”. We have tools which might help, but which fail us a lot in practice. We have experience, which is rarely fully transferable into the present context. We have number-crunching tools, which employ algorithms which do not actually predict anything. They do not do what we aspire for them to do for us. We also have sponsors who want to know how much our effort will cost and when it will be done.

The conversation, fully engaged in, will offer opportunities to correct the course as we proceed. We can, and sometimes do, bring projects in on time and on budget, though in my quarter century of project work, I’ve rarely seen this result. When it did occur, the path predicted in the plan was not the path that led to achieving this result. The planning always, in retrospect, became more important than the plan. The predicting more significant than the predictions.

The predicting provides some boundaries, which are useful hash marks for our judgment as we move through the project. They do not so much tell us what the effort

should cost or how much time something should take, but provide instead a framework within which to consider and consider again. An article in the Wall Street Journal described the effects of micro-managing, creating daily targets and attempting to meet them as the means for achieving a long-term strategic goal. The piece concluded that daily targets were a distraction. If daily targets are a distraction, are weekly targets more strategically useful or are quarterly targets more useful? Some companies have stopped publishing quarterly projections, explaining that progress toward strategic objectives cannot be usefully assessed at so fine a granularity. So how should we predict?

In practice, projects might well produce intended-to-be predictable projections, but replace these in practice with more pragmatic measures of success. In classic project management, we create change orders, which might do one of two things. They might catalogue what was actually needed to preserve original intentions or they might catalogue a change in original intentions, either of which might affect the “goodness” of the original predictions. Also in practice, we find endless opportunities to change our relationship with our predictions. What seemed reasonable in the context of surveying without benefit of the territory can seem absurd in the presence of the territory.

So we unavoidably encounter endless paradoxes whenever we predict real-world events, even on projects. If projects were scripted performances rather than conversations, we might fix this feature by creating better scripts. And for projects which are small and focused upon manipulating physical stuff (an automobile repair, a home remodeling project) we’ve gotten pretty good at making the result match the prediction. In practice, we start by predicting and predict more-or-less continuously until the end. The idea of committing only to the foreseeable micro-future is of little strategic value, and may well create more harm than good, though the predictions are likely to be “good”, in that the work matches the predicted effort. Matching the prediction is never the highest purpose of any project.

So, what is a good prediction? A good prediction embodies our present understanding of our future intention. It is first visible. Visibility requires appropriate granularity. Too fine, and we can't see the forest for the trees. Too gross, and we might miss the streams bisecting the forest. It also requires some regularity. Targets such as “month end” provide lousy visibility, since month ends appear irregularly on any day of the week. One useful concept is one proposed by Norm Kashdan called Cycle Time. Cycle Time partitions the year into four equally-sized quarters, comprised of twelve work weeks and one “sabbatical week”. Each week starts on a Monday and ends on a Friday, with

two sabbatical days (Saturday and Sunday) buffering between. Each quarter cycle is further partitioned into six week cycles, which can be further partitioned into two week cycles, which can be further partitioned into one week cycles. Cycle Time provides a regular framework within which to envision and position effort. This encourages coherent envisioning, which encourages coherent execution. The irregularity of the calendar alone encourages a subtle arrhythmia which can't help but effect execution, no matter how "good" the predictions might be.

Finally, predictions belong to that class of experience which can only be judged after the fact. Their goodness, their usefulness in informing judgment, can only be assessed at the end of the effort, when their goodness or badness becomes a moot issue. I encourage people attending our Mastering Projects Workshop to identify "real" success criteria, which might better inform their judgment than "on time, on budget, on spec" projections. These real success criteria need not conflict with the aspiration to produce "good" numbers, and in practice, provide the necessary, pragmatic perspective which enables the effort to deliver to expectations.

My favorite prediction goes like this: we are creating a project where we are a community, working together, with shared intentions, toward a common objective, with limited, but not necessarily limiting resources, in a way that enhances individual quality of experience.

In this context, whatever the predicted numbers, we are more likely to make good judgments as we proceed.

Finally (finally), when the sponsor asks how much this will cost and how long it will take, I respond by asking how much he would like to spend and when he would like it to be delivered. This initiates a conversation which might result in an agreement we can both feel comfortable working within.

**Tobias:** Agile methods rely heavily on self organizing teams. What is your experience with this? Is self organization a good way to foster the kind of ethical responsibility you mention? And how can one help a self organizing team without interrupting the actual self-organization?

**David:** The label "self organizing" bothers me. It doesn't mention the elements actually involved in self organizing, and implies that only one of three critically important elements is involved. Whatever the method employed to spark organization, our response is to balance our self with others and with the context we find ourselves in. Since we author our interpretation of others and what they are up to, and our interpretation of the context and what that means, we are always self organizing. Even

when we are directed to organize in some specific way, how we interpret that direction deeply influences the resulting organization.

Victor Frankl, who survived Nazi concentration camps, noted that those who survived that ordeal, that most extreme experience of being externally organized, survived because they found deeper meaning in the organizing injunction. They found what I call in a project context “their project within their project assignment”. Whatever their assignment, they found something personally meaningful within its confines. And this discovery made all of the difference.

I see teams complaining about being organized by management, arguing that they would be better off if their management would allow them to be self organizing, and, while complaining about their situation, ignoring the opportunities remaining for them to organize themselves. I see other teams embracing social anarchy as if that were self organization, forfeiting the opportunities to discover coherence within their situation. These teams ignore their context, creating tenuously isolated pockets which conflict with the sponsoring informal organization surrounding them. They maintain fences, believing that these will somehow result in good neighbors.

Self organization is the only possible kind of organization. But there’s self organization and then there’s *self* organization. Self organization means balancing what you know about yourself with what you understand about others and about the context you’re imbedded within. *Self* organization means organizing as if others and the context doesn’t matter. *Self* organization is self centered, while self organization centers the self relative to others and to the context.

In *The Blind Men*, I argue for sitting with the apparent disorganized mess for a while before imposing order upon it. I make this suggestion because sitting with the mess is where we learn about others and about the context. If we impose a tidy orderliness upon ourselves first, before we understand our surroundings, we are unlikely to be well adapted to the variety surrounding us. This results in less than agile responses as unexpected surprises emerge from others and the context. Of course, surprises will always emerge, but the self organized are more coherent to their surroundings than the *self* organized or the *other* organized (those organized as if the context and the self don’t matter) and the *context* organized (those organized as if the self and others don’t matter).

The key question when it comes to self organization always centers around acknowledgment. Can we fully acknowledge the context and its imperatives, others and their needs and aspirations, and our own preferences and perspectives? Or do we believe that we must, in the interest of organization, ignore some of these influences in

order to achieve orderliness? Those teams courageous enough to more fully acknowledge all three elements and foolhardy enough to seek to find balance between them, create effective organizations. Those who cannot might call the resulting tidiness “self organization”, but attributing the form to their own efforts won’t make it any more coherent.

I may be dancing around my real point here. In *The Blind Men*, I acknowledge something I call a Central Organizing Principle. This, it seems to me, always emerges and depends most tenaciously upon those present. Those present might not be able to finely describe their central organizing principle, but they each know when it emerges.

Whatever the injunction initiating the organizing, whoever issues the order to become “orderly”, from the resulting response (which is always self organization), some central organizing principle emerges from the dance between self, other, and context, whether or not these influences are acknowledged. Common COPs in software development are speed, quality, and quantity. Who imposed upon the team interested in quality an organization better adapted to speed than to quality? No one and everyone. The influence squeaks in.

This opens up another, deeper level, where we can consider if the emergent COP is one well suited to the present situation. Inappropriate COPs, usually unconsciously embraced, are the most common source of the arrhythmia I call incoherence. The source of inappropriate COPs is most often unconsciousness, being unaware of the available choices and staying unaware of the choices actually embraced. The Ethical Responsibilities are useful for enabling awareness because they inform choice. Since uninformed choice is the most insidious form of slavery, engaging in self organization without being informed by the Ethical Responsibilities can, and often does, result in a more encumbering organization than if a despot defined it. In fact, I think of uninformed choice as the most punishing despot, though we often find someone other than our own choices culpable.

How can you help a team with self organization without interrupting actual self organizing? Actual self organizing cannot be meaningfully interrupted, since self (as opposed to *self*) organizing includes acknowledging and responding to interruptions. The key, as I mentioned above, is awareness. I start with self awareness. I ask, what’s your purpose for being involved? What’s your project within this project assignment? And when I get a blank stare in response, I help that person discover their purpose. This usually requires me to do no more than state some obvious something – obvious to me but often not previously obvious to them. Next, I encourage others to share what they’re up to.

This encourages a fuller acknowledgment of others, and can enhance the team's ability to self organize. Then, I focus upon more fully acknowledging the context within which the effort is expected to operate. This can encourage despondency at first, since every context seems first poorly suited to the envisioned pursuit. But on the other side of this almost inevitable mess lies a central organizing principle, which can and will emerge following this acknowledgment.

**Tobias:** Getting practical, if you had only a few minutes to advise a project participant that feels his or her project is not working properly, how would you try and help that person?

**David:** My basic prescription for a team member who feels that his or her project is not working properly is to be clear about what they want and maintain scrupulous attention to the way things are, rather than to how they should be, used to be, or aren't. This, combined with the ethical responsibility to acknowledge your own blindness, to fully accept that you do not know how to resolve the situation, and the courage to act, encourages the sort of mess from which new central organizing principles might emerge. Poorly adapted COPs are maintained by focusing upon problems, reliving the past and preliving the future, and by staying stuck (tidily organized) within those stories. Better adapted COPs emerge from full acknowledgment of self, other, and context.

**Tobias:** Speaking of finding one's own purpose of being involved – what's your purpose of what you're doing today? Which roads led you to where you are today, and where do you come from?

**David:** As I said in *The Blind Men*, I really believe that I am here as a witness. My purpose must be to describe what I see in ways that others might recognize what they had not previously acknowledged. This to increase awareness, consciousness. I understand that in the lean and increasingly meaner business environment, speaking of increasing awareness and consciousness might seem odd, and a long way from anyone's daily concerns about meeting a projected bottom line, but in my humble experience, we cannot satisfy our aspirations by merely focusing upon creating repeatable patterns of action, though this is where project work has often focused attention. In a very real sense, we invent every outcome, pleasing or satisfying, we produce, and invention requires meticulous attention to the way things are as well as a clear intention of the way we would like them to be. Attention and intention both require awareness and a focused consciousness, which is why *The Blind Men* characterizes the basic difficulty with projects as "incoherence", and the basic prescription for improving it as "coherence".

Which roads led me to where I am today? All of them, actually. High points: the play I wrote in 5th grade, which my class produced, where I was carried out of the auditorium on my classmates' shoulders. Later, I was a failed grammarian, then a failed typist, which convinced me, despite my early success, that I could not be a writer. I embraced a shorter form and became a songwriter and musician (a single acoustic act, as my agents used to classify me) for the seven years following my graduation from a high school experience that convinced me that I was neither very smart nor well-suited to academic life. Later, I went to university, starting when I was 25, and earned a BS (you are free to interpret the letters in any way you'd like) in Marketing, which I never used. I secured a job in an insurance company and worked myself into the role of liaison between IT and their "users". Later, I became a project manager there, and often found myself assigned to projects that had proven unworkable. I eventually became the manager of all of the company's IT project managers before leaving in the early nineties, to join a small consulting firm in Silicon Valley. Ontara studied and developed a model for high technology project leadership which incorporated what the most successful leaders told us they actually did, which often had no resemblance to the earned value, logistical scheduling and control tactics we were all taught to believe defined real project work. We worked with many of the most successful companies in Silicon Valley to help project workers overcome their notions about how projects were supposed to work, so they could actually make them work. Much of my effort was focused upon raising awareness of both the situations surrounding them and their inherent capabilities, much as I had discovered mine in the fifth grade. During this time, was invited to join Jerry and Dani Weinberg as faculty for their Problem Solving Leadership workshop, and I facilitated those experiences for seven years, until Jerry and Dani retired in 2002. Ontara imploded in the mid-nineties, and I emerged from the noxious cloud with their intellectual property and the idea for a company that could really make a difference, True North pgs. Since 1996, I've been working to integrate what I knew in fifth grade with what I've been learning since. Last month, I, after a twenty-something year absence, finished a keynote speech by performing a song, the poem that concludes The Blind Men. My writing sparked the invitation to join Ontara and eventually led to The Blind Men and the Elephant, which was published two years ago now.

**Tobias:** Finally: what's up next on your radar, which interesting general topics or problems will you delve into over the coming years?

**David:** I made a commitment last month to write another book. This one will be about some of the details behind the idea of Project Community and will include a powerful

model for working with the various forms of informal organizations that appear within every organization.

It will consider, for instance, what “good project management” looks like in a clique, charismatic, and chaotic organization, and how rational ideals might be meaningfully altered to fit each organization’s unique preferences and capabilities. I will continue to work to integrate the various “selves” I’ve accumulated so far. I expect to be performing more as a part of my speaking engagements. I will be writing more about and further developing the practice of Brief Consulting, as I introduced in my last Compass newsletter. As a part of this, my partner Amy and I will be developing some unconventional Outcome Metrics intended to refocus attention toward those results that really make a difference when people work together.

Finally, as you might have heard, the United States has been experiencing a deepening economic recession, which for the first time in living memory, has seriously affected the professional class. I have been attending many conferences which are attended by unemployed and under-employed consultants, coaches, and guides. Several of my colleagues have lost their homes during this period, and it’s been difficult to impossible for most of us to tread water. Amy and I are considering strategies to help put this wasting resource back into productive employment.

Thank you, Tobias, for your sparkling questions. I’ve enjoyed the perturbation very much. Your inquiry came at a very good time for me, a time when I feel that I really needed to more deeply consider what the \*bleep\* I have been doing, and where exactly I am headed. ■ ■ ■

#### MORE WITH DAVID SCHMALTZ

- [A short radio interview with David Schmaltz](#)
- [The Blind Men and the Elephant : Mastering Project Work](#)
- [Compass - True North Consulting's Newsletter](#)



**Tobias Fors keeps confusing both himself and other people, but still manages do some good in his work as a consultant. You can help him get his head straightened out by initiating a conversation with him on: [tobias dot fors at citerus dot se](mailto:tobias dot fors at citerus dot se).**