

# **Servant Leadership as the Means for Collective Action in Project Management**

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## **Abstract**

This paper describes a set of unconventional, easy, and simple leadership practices that transformed the near failure of a software development project into success. These practices, based on the idea of "leadership as a service", provide the structure for individual and collective action. Principles of this idea include a strong dedication to the truth, equality of team members, clarity of goals, instant feedback, and a belief in self-organizing groups. These principles enable teams to openly share individual mental models and build common vision; which in turn helps team members to align with the goals of their project.

Combining collective action with individual responsibility enables high performance in an environment that is often characterized by cynicism, over-commitment, frustration and a sense of helplessness. In the case of the project described in this paper the group became a true team, it delivered a product passing all quality metrics in every single test cycle, and it provided 100% of the functions promised to its customer.

All of this happened within six months.

Project management was a service to the team, helping the team to find its purpose. This service created clarity for the task at hand, awareness of the true interactions among the team members, a stand against outside forces on a daily basis, and the guidance to stay on course. The project manager enabled the team to do its work. When all was delivered, the team could proudly say: "we did it ourselves" and the need for a project manager had disappeared.

## **Keywords**

Servant leadership, alignment, project management, collective action, structure, individual and collective accountability, feedback, shared vision.

## **Acknowledgments**

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## **Introduction**

The task at hand seemed straightforward. Software was needed to enable bi-directional exchange of certain product data, such as assembly information, across two different systems. The

technical challenge was high but not impossible.

Now, imagine everything that can go wrong. The product was already promised to customers but the delivery date was severely threatened; the project team was composed of bright people but it was internally separated by multiple and divergent objectives; a fixed delivery date had been set but no clear understanding of the requirements existed; executive management was under high tension resulting in project management from the outside in, and team spirit was torn between frustration, cynicism, dedication, and the fear of failing.

At the climax of the situation executive management decided to install a dedicated project leader in the hope that this would provide focus and turn the situation around.

The newly installed project leader joined the existing technical leader, and a quality manager to form the management team. In the first week after the new leadership team was put into place a brainstorming session was held with the development team to clarify the issues. It quickly became clear that the team faced multiple technical and “soft” challenges and that the absence of direction and the loss of identity had stalled the team.

Based on the belief that leadership is primarily a service to the people being lead, the following questions helped to turn the project around and bring the team back on course:

- What will create clarity about the goal ?
- What obstacles are in the way of the team and how can they be removed ?
- What will generate the individual motivation to mobilize extra energy and dedication to meet the challenges?
- What will it take to deliver on time given the existing constraints ?

The following is an account of the key principles and behaviors that helped the group to become a real team, get the job done, and have fun while working on this project.

## **Project History**

In late 1995 SDRC initiated a project to enable the exchange of product data, centered around product structure among its CAD/CAM/CAE and PDM products, I-DEAS and Metaphase. A project team was created with the objective to create the necessary software. After the team had worked the problem for roughly six months it became obvious that something was going wrong. Timelines started to continuously slide and management became concerned about the delivery date which had been already promised to selected customers. Significantly contributing to the situation was the fact that the team still struggled with the question of “what it was supposed to deliver”.

## **Paradigm Shift**

The project leader faced two basic choices in working with the team. One was to apply a traditional

set of tools, including extra financial awards, pressure, an authoritarian leadership style and a “just fix it” attitude. The other option was to identify and address the real challenges of the project and proactively involve all team members in the discovery of the solutions.

This approach, which we call “Servant Leadership in Project Management” is based on the assumption that people basically want to contribute [dru]. But often a group of people is asked to do a task in an environment that actually prevents productive work. Lack of clarity and structure often creates the void that is filled with pseudo solutions; lack of common understanding prevents enrollment and commitment; lack of consistent and simple feedback allows individuals to stray away from a defined path. It is the responsibility and the role of the of project leader to be aware of these obstacles and to get them “out of the way”. In this sense the project leader performs like a “midwife” helping the project team to deliver its product with the least possible complications.

“Servant leadership in Project Management” [lao] creates clarity, structure and alignment. Based on these principles, it removes obstacles, provides instant and clear feedback, allows results to be measured, and helps the team stay on course. It also provides a “home” for the team. The team creates the results and the project leader “gets out of the way” whenever possible. When the work is done the team

members can proudly say: *We did the work ourselves.*

## Clarity

Creating clarity is like cleaning your windshields. Dirty windshields are dangerous because you can not see where you are and where you are heading. The same is true in project management. We focused a lot of energy to create a clear picture [csi] of the situation in the team and its environment. Our belief was that without knowing the current position even the best guidance system would not create results.

### *Understanding the past*

One task we asked the team to perform early on was a week long session understanding “what had happened” since the team had been formed in late 1995. This inquiry included brainstorming sessions with the whole team and individual interviews with each team member. Two lists of issues were developed, concerning technical and “people” aspects of the project. The technical list pointed to issues, such as the management of source code using two very different management systems. The list of “people” issues was three times longer than the list of technical problems and pointed to issues that seemed to have caused the “broken” state of the project. This prioritized “peoples” issues list included statements such as:

- We are not a team.
- Our project is over-managed.
- We do not know what to produce.
- We do not know our customer.

- We do not have high level management support (trust).
- We do not know our ‘destination’.
- We have competing solutions in mind and cannot resolve our conflicts.

Individual interviews confirmed that there was strong competition among some team members concerning the technical direction the project should take. This conflict dominated the team meetings and expressed itself in endless discussions of imagined customer problems. The opportunity to express the real issues helped each team member to differentiate issues related to the project from those related to the team.

### ***Clarity of goals***

Creating clarity around the content of the deliverable, the internal and external expectations, and the delivery date required six intense weeks of work. The team engaged in a continuous dialog with its primary customer following these principles:

- Listen to the customer [cov, mur]
- Understand the customer [dru]
- Negotiate a minimum content
- Point out possible conflicts between customer requirements and technology constraints

The final results of the negotiations were permanently posted (Figure 1) in the group’s team room and served as a constant reminder of the common goals to the development group, the planners and the customer.

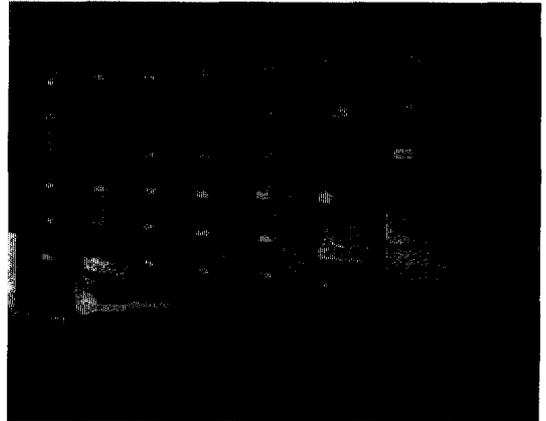


Figure 1, Contract Wall

## **Creating Structure**

### ***The structure of the team***

Uncovering the real structure of the team became an ongoing activity. The understanding of the dynamic nature of the project significantly improved the team’s capability to deal with conflict. The real roles and responsibilities were by no means clear at the beginning. The situation was characterized by the following:

- At least two team members thought to have the technical lead;
- Several team members repeatedly challenged each others skills based on “negative” experience in previous projects;
- Team members represented very divers areas of expertise which for the first time had been brought together in one project.
- Software management required different processes with the need of synchronization. This required a work discipline not shared across all team members.

The initial structure of the solution suggested a team organization where roles and responsibilities would be stable across the project life. That proved to be a wrong assumption. Uncovering the solution followed its own dynamic which reflected back on the team structure. We restructured the team twice, each time the structure was more closely aligned with the reality of how we actually created and tested the product. This proved to be a valuable but painful exercise and required team members to give up positions they felt comfortable with.

Attention to the pain of the people who were most affected by the change and clarity of the reasons why the change was necessary enabled successful completion of the transitions.

### ***Having a Home***

The characteristics of the original team included that it was physically dispersed across the development center. On one floor the distance between the cubicles of the team members was so large that instant communication was not possible. The assumption that "email" and "voice mail" would substitute physical closeness proved to be an illusion. When the team had to meet, in the beginning on a daily basis, it needed to use the established "conference room" routine, fighting for rooms and meeting in different rooms every day.

This environment prevented instant and direct communication. It also deprived the team from having

a home. Its main drawback was that it prevented continuous knowledge build-up and momentum. Every time the team met it needed to spend significant time to restate what had already been said in previous meetings. One of the first decisions made by the new project management team was to establish a team home. This was done by declaring a conference room publicly as the permanent project home.

This dedicated room was the communications center of the team. The walls became large "screens", filled with customer requirements, project objectives, project status, weekly objectives, and weekly measurements. New team members and visitors would get a "tour" of the room, knowing within 15 minutes what the project was all about including its current status. Executive management would meet on a weekly basis in this room and the information on the walls was part of the weekly status reports.

In a second move the team insisted on physical proximity and demanded relocation of all team members around the team room. After some struggle with the building administration all team members were located around the team room and people working on the same tasks were seated close to each other.

These two decision improved the communications capabilities of the team dramatically. Instead of wasting time walking the floors or fighting for meeting rooms, the team was freed from unnecessary

bureaucracy and clutter. In addition these two decisions created a sense of unity and belonging in the team which was admired by many on the outside.

### ***Weekly Rhythm***

The weekly rhythm was a simple, cyclic process repeated on a weekly basis. It contained two steps; on Mondays each team member would state and commit to his or her weekly objectives and on Fridays the team would decide, based on established metrics, whether the team member achieved his or her objectives. In the beginning the team did not like this pattern. But the Friday sessions turned out to provide constructive feedback for each individual team member and the team as a whole. This slowly built trust among the team members and enabled open and honest discussion of the real state of the project.

### **Feedback**

After the project deliverable had been negotiated and agreed upon, staying on track was the key objective. Several methodologies, including project management software, were used. But the methods that made a difference were quite simple and “non-electronic”. They consisted of:

- A set of milestones;
- Milestone measurements;
- A simple tracking chart [pdm]
- A weekly tracking routine
- A place to record unexpected challenges
- Confidential polls

Used together these tools helped the team to understand its position regarding the delivery date[sen], the status of the work delivered to date, and the quality of the deliverable itself.

### ***Milestones***

The team defined the milestones collectively and as early as possible. Due to the “unknowns” at the early stages, the milestones underwent two significant updates during the project.

Each milestone included a target deliverable and measurements for that deliverable. The “master” milestones chart was displayed in the team room together with the tracking chart. For each group of similar milestones the appropriate metrics (code walk through, tests, etc.) were also displayed. The electronic project management tool was used heavily during the start-up phase until the task structure and the development process became clear to everybody. Thereafter its purpose was primarily to communicate project progress to management without any significant impact on the project itself.

The team actually defined the milestones twice. A first set of milestones established the “thinking” in milestones, but the content of the milestones and the related measurements did not reflect what was actually being developed. When more detail about the real product structure was discovered a new, more detailed set of milestones was developed. The detail of the milestones was a key element to

define their measurements and exit criteria.

Milestones were tracked using a chart the team called the **“dedication to the truth”** chart (Figure 2) [pdm]. The axes of this chart are labeled “predicted date” and “date of prediction”. At each “date of prediction”, in the case of this project weekly intervals, the team predicted the completion dates (predicted dates) of the milestones laying ahead. It also checked off the achieved milestones. Used with rigor one can not escape the real status of the project, because delays become obvious and can not be brushed over.

For most of the tasks we experienced a healthy relationship of prediction and actual delivery. Knowing each week whether we might slip a milestone and seeing the impact of this slip on other milestones and the final delivery date provided the necessary feedback to stay on course. But one task escaped us for weeks; having this visually in front of us generated so much “pain” that we finally got it under control.

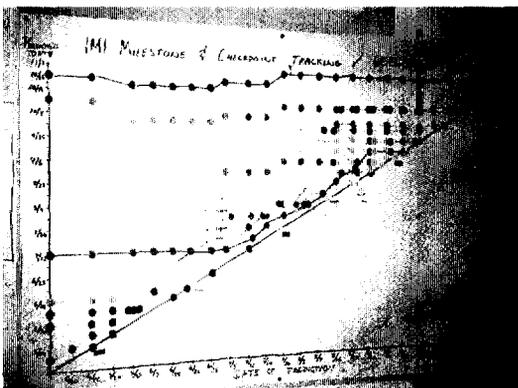


Figure 2, “Dedication to the Truth”

## Confidence polls

Another very simple and effective tool was the “confidence poll”. Every Friday morning, at the end of the weekly “achievement” session, the team gathered around the Confidence Chart and, using dots, voted on the question “Are we delivering value to our customer on time?”. Voting was on “yes” and “No” only. The polls were always confidential and the project leader left the room during the polls. Despite the simplicity, the chart gave immediate and crisp feedback of the emotional state of the project team.

## Unexpected Challenges

This chart was thought of as “useless” when introduced at first. It was in essence an empty flip-chart titled “Unexpected Challenges” (Figure 3). But it filled up rather fast.

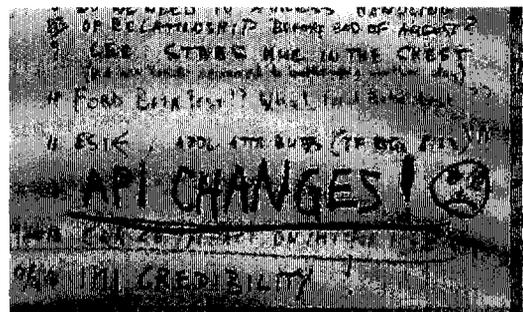


Figure 3, “Unexpected” Challenges

The team used this chart primarily to express key frustrations, and in this context it was our most successful tool. We recorded many painful issues on this chart. How much frustration some of these issues represented was easily visible by the language used and the size of the letters.

# Alignment

## *Identifying Common Ground*

The team had a relatively large degree of freedom in creating the product except for three key elements:

- The delivery date
- The “minimum content”
- Quality

Flexibility existed in the possibility to request additional resources on short notice. There was high management commitment to help the team although ad hoc resource allocation providing the right skills at the right time proved to be difficult and did not happen too often.

Clarity about the project was created fast and early on, but personal commitment [dep, pec] to the project goals required much more time. Initially, project management’s definition of “commitment” was that personal time would be sacrificed in case any of the three elements (delivery date, minimum content, quality) would be threatened. That definition was not shared across all team members. We actually faced three basic patterns expressed by different team members:

- We will get the job done whatever it takes.
- We do our best but if it requires personal sacrifice we need additional motivation.
- We do our best but we will not sacrifice our personal life outside normal business hours.

Two behaviors seemed to influence team members in their individual decision whenever we faced short term crisis (there were many). One was the fact that project management walked its talk [pec]. By serving as an example in areas such as being on time, taking commitments serious, being accountable for their actions, and a dedication to tell the “truth” created a sense of integrity in the team that reflected back on all team members.

The other was the weekly rhythm. This process required every team member to state individual objectives and achievements in front of the whole team on a weekly basis. This created a sense of personal responsibility and accountability which was difficult to escape.

A third pattern that created alignment was, what the team called “sing and dance” sessions. Whenever out of line situations became apparent, the project leader, as part of the weekly meeting would plead for support. This pleading process included a variety of “things” among them:

- Explaining in detail the causes of the out of line situation;
- Repeating the common objectives of the group;
- Reminding the group (and individual team members) that the targets in question had been set by themselves.

These sessions created results but facing our own commitments with integrity was often painful.

A fourth behavior that seemed to build commitment was the ritual of celebrating success whenever a milestone was completed.

### ***Team rules***

Team rules helped us with our basic person to person interactions. The team decided upon the rules and they were posted permanently in the team room. The rules were simple and short:

- We listen with the intent to understand each other[cov];
- We work towards common goals;
- Critique will be constructive;
- We thrive towards consensus;
- We will not discredit each other.

### ***Building trust***

The team used two basic software development processes, one to develop the product in an iterative manner (also called “spiral approach”). The other was a combination of two source code management systems enabling local as well as group source code management. Clarity about the process steps was a key challenge in the group and it took several attempts to come to a state of “flow” in these processes [csi]. Some team members viewed all processes initially as “bureaucratic procedures”.

The team needed only a short time to see the benefits of the “spiral” development process, because each team member could relate his or her contribution directly to the tasks in the process. A picture of the principle structure of the

process was permanently displayed in the team room and with each iteration the team became more efficient in executing the assigned tasks.

Adhering to the software management process was significantly more difficult. For a long time no effective mechanism existed until finally one team member introduced the “flag”, a skull and cross-bones pirate flag (Figure 4). Displaying the “flag” above the team meant “danger”, i.e. a time when the common databases were in an unstable state, such as during code integration. An email accompanied this announcement explaining the reason for the “flag” being up.



Figure 4, The “Flag”

Without any transition period this simple process eliminated all “anomalies” with the common code base at once. The “flag” became a treasured symbol for the team, still in use today.

### **Servant Leadership**

The team delivered its product in six months, within five days of the projected delivery date. This result was possible because the team wanted it to happen. It was the spirit

of the team that made it happen. There were few obstacles the team felt it could not handle, and even in these cases the determination to “get the job done” overcame the obstacles eventually.

We believe that our principles of servant leadership [lao]; clarity, self-organizing structures, alignment, accountability and personal integrity are the real reason why the team turned the situation around. The project leader was the catalyst to bring these principles to the surface. Leadership was basically a service to the team.

The project ended as it had started, with a brainstorming session on “what worked” and “what did not work”. A 360° review complemented this activity. The following lists, which represent the “voice” of the team are a combination of these findings:

#### ***Things that worked (leadership)***

- Promotion of shared ownership
- Assuming responsibility
- Breaking down barriers
- Leading by example
- Positive work environment
- Change in face of resistance
- Instant and direct feedback

#### ***Things that worked (environment)***

- Co-location
- Team room
- Process Flexibility
- Visual Feedback
- Milestones

After the project was done, the role of the project manager had all but disappeared. In the end it was each team member’s commitment to his or her individual contribution combined with an understanding of and the dedication to the “whole” that made it happen. And that’s probably the lesson to learn. It is that simple.



With the best of leaders,  
When the work is done,  
The project completed,  
The people all say  
“We did it ourselves”

[tao, 17]

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