

Psychological tactics for developing trust and focus to achieve project success

Dr. David STEVENS

Strategic Thinking Pty Ltd
Australia

INTRODUCTION

Partnering is a process that exists in parallel to a contract. As a practitioner/facilitator this paper reflects my experiences in the Partnering workshop situation only and focuses on the tactics that are introduced and rehearsed in the workshop to help sustain critical aspects of the Partnering relationship for the entire duration of a project between the relevant stakeholders. In the first instance we talk about the key “soft skills”. In the second instance we will dwell upon the infrastructural aspects of the workshop that are necessary to ensure these soft skills are implemented.

Trust

Intuitively we all believe that we understand what trust is. But do we really? Intuition tells us that trust is based upon good relationships. How well we get on with people is usually regarded as “rapport”. Recent psychological research carried out by Connexure Pty Ltd , (my partner company vested with developing relationship, organisational climate and project climate analysis tools, www.connexure.com), points to the fact that trust is not just rapport alone. It is also depends, to a slightly larger degree on reputation. But most importantly trust relates to consistent and reliable delivery of results.

Our research shows that trust is made up of the following constituents. 20% rapport; 30% reputation; 50% results.

Thus from a pragmatic point of view, “results”, that is the consistent and reliable delivery of project promises is what really counts. In fact, contrary to our intuition, we can trust people we don’t even like; so long as they deliver the goods.

Measuring trust

Within the context of Partnering, if we are to take a practical approach we need to be able to measure the level of trust that we have between ourselves and the key players we have to interact with (or using Partner terminology be “interdependent with”) to successfully deliver our project. Connexure has delivered an instrument that measures rapport, reputation and results and thus provides a total trust strength score. The instrument then indicates three levels of trust strengths. On a score of 60 to 100 we know that the key person we have the relationship with, a person for example who is very influential in decision-making that effects our results, that person will be a strong advocate of our talents. Here trust is very high! On a score from 30 to 59 we still have adequate trust strength. The person is a supporter of us. With scores of 0 to 29 the key person with whom we have the relationship is only a by-stander. They are indifferent to us and to the notion of trust between us. For a score of 0 or less we have a serious problem. The person questions our very being. They do not trust us. Work has to be done in this area!

Connexure has further developed another instrument which indicates the level of investment we have made in developing our relationship with the other party. We can be over-investing, under-investing or have a balanced investment in terms of the amount of energy we put into developing that relationship and hence trust. From the trust strength tool and the trust investment tool we can quantify a trust ratio.

Building up relationships

One of the key components of a positive relationship with key decision makers and influences in a project is therefore trust. When we need to build up trust we need to understand not only the broad psychological/personality profile of the key targeted person but also knowing what the suggested behaviour and what the suggested messages are that we should be sending. To enable us to carry this out as a

facilitator I use the Big 5 Force Assessment Tool. This is a robust assessment which measures five key personality factors.

These include flexibility, organisation, relaxation, co-operation and energy levels. From this we can derive a summary style of their behaviour and from that we can then be specific in terms of the behaviour we need to exhibit, as effective partners, to build trust. We also can define the sorts of messages that we should be sending that person.

Is this manipulative? Well the answer is yes. But it is no more manipulative than what happens in marriage counselling, grief or post traumatic stress counselling. We are simply looking at ways of constructively relating to other people.

Communication is important too

Continuing our theme of practical intervention at the Partnering workshop, but not necessarily in the order they would be presented in the workshop, I will discuss the next commonly used tool which is the Issue Resolution Matrix, sometimes known as the Communication Matrix.

The Issue Resolution Matrix is a one-page summary that clearly indicates many things. It indicates the level of authority or decision making that a particular person, within an organisation, resides at. It then indicates the issue types that that person is empowered to make decisions upon. It defines who their partner is that they are enabled to make decisions with, in the other stakeholder groups. It also defines the maximum length of time that they have to resolve an issue. The matrix even goes to the extent of defining the resources that could be required by individuals operating at that level to enable them to make a decision, or indeed resolve a conflict.

Most importantly the matrix identifies the next level of decision making that should be involved if conflict is not resolved at a defined level. Normally on the matrix there are five maybe six levels of decision making.

The matrix, if done correctly, is so well articulated that it enables project members, who have not been at a Partnering workshop, the opportunity to quickly grasp the roles and level of responsibility of everybody on the project team and who their corresponding partners are. It is a powerful tool. Many practitioners/facilitators find the process too complex or too time consuming and thus avoid it. From my point of view the Partnering workshop and thus the Partnering process has not been implemented properly if the matrix is not completed.

Within the Hong Kong Housing Authority we have experimented with the matrix and have found with some preparation done prior to the actual workshop itself, that the process of putting together the matrix can be expedited significantly. It is still important though that the matrix is worked on by all participants at the workshop to refine it, review it, understand it and of course participate in it's final form.

Defining roles and responsibilities

A key aspect of communication within the project is for team members to understand their roles and responsibilities, and those of all other members. As mentioned the matrix will do most of this. However on occasions, within the workshop context, it's important for new (or unusual roles or misunderstood roles) to be clearly defined by their key members. In a workshop context this is usually done at the end of a workshop on a group basis.

Interpersonal Communication

Within the workshop context a very simple and light hearted (but with very serious connotations) technique we use is the "from me to you" technique. This is a simple device, once a level of trust is established within the group, for individuals to use who know they have to communicate with each other on a regular basis and to be open in their communication. The technique consists of writing a letter nominating up to three things that the person should continue doing or do better and three things the person should stop doing. We have used this with quite significant success within the Hong Kong Housing Authority Partnering workshops.

Identifying common project objectives and potentially conflicting project objectives

It is critical from the outset of the workshop, and indeed prior to the workshop, to identify at least one if not more common project objectives.

These are objectives that inevitably are accepted by all stakeholders. There must be at least one common objective to all parties, if not there can't be a project.

There is no simple tool for establishing common and then in turn conflicting or potentially conflicting objectives. It is more a matter of explanation and understanding.

Tools for post-workshop or pre-workshop project team assessment

As an Organisational and Industrial Psychologist I have access to many thousands of psychological instruments that have well established scientific reliability and validity. One of the instruments used, on a recent regular basis, (and has been used both with Hong Kong Housing Authority and MTR) is the Team Climate Inventory (TCI).

This particular instrument measures the whole team on certain factors such as information sharing, interaction frequency, clarity, value, task orientation and so on. A simple questionnaire is given to all project team members. These are filled in anonymously. The results are then gathered by the independent facilitator and are computer scored. The print out gives a profile on fifteen factors that are important to effective teams. These are either normed against similar teams from outside organisations or, as data is built up, measured against other teams within the organisation. In MTR we have measured several teams and we have been able to measure them not only against external teams to MTR but also to other project teams within MTR. This can be quite illuminating. The TCI does not measure an individual's performance, only the performance of the team as a whole. The test can quickly identify relationship type difficulties. Recommendations come with the test on how to improve these areas.

Another area of project assessment which can be valuable focuses on the individual level.

Here individuals are measured in terms of their preferred team style. After filling in a survey, which is computer scored, each team member is given a 15 to 20 page print out of the summary of their team management style and what this means. The facilitator meets for usually 2 to 3 hours with the team to explain how a balanced team operates. This process has been used with MTR.

An example of this approach can be found by accessing www.projectivtyonline.com

Three Key Psychological Factors that make Partnering workshops work

The first is the notion of participation, ownership and commitment. This is very important. If the project team is to achieve a series of goals there needs to be a high level of participation by as many of those team members as possible in the formulation of the strategies to achieve those goals. If this occurs there's ownership. If there's ownership there will be commitment to success in the achievement of those goals.

The second is referred to by me as the "battery analogy". Many people are cynical about working in groups to solve problems. The whole notion of Partnering is about presenting multiple options to problems and working as teams to deliver the best solutions to problems.

The best way to appreciate this is to understand to notion of aggregating intelligence, creativity and problem solving. An individual cannot conceivably compete with the intellectual power of a group of people.

Finally one of the most important factors for participants in a Partnering workshop to understand is the notion that the Partnering workshop is only a vehicle for rehearsal of particular techniques associated with successful Partnering. The facilitator "prime pumps" the situation. The facilitator puts together a series of techniques that ultimately leads to mechanisms being put into place to find solutions. In the workshop itself it is not crucial to find solutions, just to work together to find multiple options and to put into place this mechanism for finding solutions.

Guaranteeing workshop success

There are several things that we need to consider for guaranteeing a workshop success. This ultimately is the key to the whole Partnering relationship success.

In the first instance the workshop needs to have a highly structured format. It is not sufficient to have a formless meeting. There needs to be specific steps which include the tools already mentioned; the Issues Resolution Matrix, identification of key performance indicators, evaluation rating forms for the Partnering process itself and so on.

But there also needs to be the opportunity to generate ideas and evaluate them together; even if solutions are not found.

And of course the role of the facilitator is very important. There must be external facilitation (at least external to the project itself). The facilitator needs to be well versed in learning theory, group counselling or group problem solving, and certain aspects of linguistics like breaking complex problems into simple components.

And of course the duration of the workshop is important. Not many contractors or sub-contractors or even clients like to spend anymore than a day on a Partnering workshop.

I can confirm the validity of this approach. It is better to have a comprehensive and well prepared one day workshop perhaps twice in the life of the project than have two consecutive days once only. Two consecutive days drag on, and is very expensive in terms of the down time to the project.

The one day workshop can be quite well justified if there is sufficient preparation.

The formal process for this takes the shape of the “strategic diagnosis” for one or two hours prior to the workshop at which two or key three representatives of the client and other stakeholders are present.

The venue at which the workshop is held is also important. It should be external to either the client or the contractor or sub-contractors. There are too many powerful psychological cues at play when using one party’s premises. And of course there will always be interruptions for

“urgent messages” from enthusiastic secretaries.

Also we must not underestimate the symbolic component of the workshop. Thus this is the reason that the Partnering charter is brought into play. Also the casual and informal yet team building component of the lunch or even dinner is also brought into play. The taking of a group photograph and the signing of a charter by all is an important symbolic component. Finally is the notion of team building games. As a psychologist with more than a thousand workshops under my belt I don't believe there is any need or justification for mere games. Working on real problems associated with real projects not only enhances communication but intrinsically builds the notion of team, if handled correctly. If the appropriate tools are applied people gain valuable knowledge in the use of those tools. But at the same time the mere act of working together using the tools, evaluating each other and so on, builds the notion of team. There is no need for games.

CONCLUSION

As I said at the beginning I am just giving a practitioner's point of view and focusing very much on the first workshop component. I'm aware the Partnering process has to be sustained by a Partnering team for the life of the project. This is where Partnering evaluation is vital. It's the result of a survey, on a monthly basis, that sets the agenda for the Partnering component of a normal project or progress meeting. An external facilitator cannot be present at all of those. A Partnering Task Force is usually made up of four to six people who have to be the champions of the process; induct new members; refine the matrix when necessary; be the keepers of the evaluation forms and be the interpreters of those; and of course to ensure that the spirit of Partnering lives on.

© *Professor Dr David Stevens, Australia*

All rights reserved. No part of this paper may be reproduced, distributed, published, or transmitted without the prior permission of the copyright owner.