

[00:00:31] Patrick (Host): Hello everyone. Hello everyone. Welcome to episode 130. This show continues to grow and grow in listenership and grow in content and just having a blast. I hope your year is off to a fantastic start and I hope you have made it past Quitters Day.

Know what that is? I heard that on a, on a, an ad on TV recently and I don't even know who the product or service was that was running the ad, but it was, they were talking about Quitters Day. It's the second Friday in January. I didn't know this. They said look it up on the ad and I did. And it's a thing, it's called Quitters Day, second Friday of January. And I think it's, it's based on research that talks about the average amount of time that it takes people to ditch their New Year's resolutions and fail on them. So if you made it past January 10th and you're still like cruising with some new discipline or commitment or habit that you're wanting to focus on, then you're doing pretty good.

I've talked to more people lately who say, no, I don't do your New Year's resolutions. All right, well, I do, I don't think I call them resolutions. I just, the new year is always, it is a fresh time for me. It's a little arbitrary, but it is a time when I do a lot of thinking and planning and committing to do better in certain things. And I'm doing pretty good on some things that I've made it past Quitters Day on. So I hope you have. One of, of the other things that happens in early January is a lot of planning is going on now. Many organizations and leaders do their planning, you know, before the first of the year. And of course, some organizations, particularly in the nonprofit sector, have a fiscal year of July through June. So the year is weird anyway and they don't start planning till the spring. But January is a planning time for a lot of people. And those plans include the big picture things like strategy and, you know, long term outlook. And they also include the departmental work and goals, individual work plans, projects. And so the timing for this particular episode is probably really good right now. One of the things in my coaching experience over the years with the nonprofit sector is that project management. And we're using that term not as a software term right now, but just as a concept. Project management is often a real challenge.

Nonprofits are often strapped for cash, often strapped for staff, and yet they have a lot of complex moving parts with multiple grants and initiatives and programs and not to mention internal projects from HR to, you name it, you know, tech projects or implementation of new systems. Those are projects. We're using the term very, very broadly. And I connected with one of our guests, Paul Geier, a number of years ago, actually met him through his father, who's done some who I met serving as a board member of a state board here in South Carolina. And got to meet Paul and kind of watching a little bit of his journey. He's been with Paul Guyer, has been with the PM Alliance, PM being project management, I'm assuming been with the PM Alliance now since 2016. Paul is a has a master's degree in project management from the Citadel, where I was earlier this week. Paul, by the way, not, not coaching the Citadel people. But we we had a meeting hosted there. And Paul is both a certified professional project manager and a certified professional facilitator. He lives in Charleston with his wife and his and his four kids, which is two cats and two chickens, as I understand it. You'll, you'll have to correct me on that, Paul, but and then Cody Holm is one of the PM alliance partners and also holds professional certifications in project management and facilitation. He lives in Atlanta with his wife and four beautiful daughters. And Paul, Paul wrapped in Cody to this conversation and we talked a little bit offline about what value might we have in a conversation with our listeners and sectors around some of the tenets of managing all these multiple demands that we face on a daily basis with all the various projects and initiatives and just all the stuff we have going on, meeting deadlines, meeting grant deliverables, meeting budgets, keeping everybody on track, communicating, you know, with a flow and an effectiveness. So we're going to talk about some of those things. We'll see where it goes in the hour. But I just want to say thanks to Paul and Cody for joining us. PM alliance, if you I'll tell you now and then I'll tell you at the end of the program. Pm-alliance.com is the website if you want to learn more. But they partner with clients

to provide mission critical project management consultants, consulting services and training. And they work with clients across sectors. They're sector Agnostic. And what I like about what I've seen in some of their work, they describe it as partnering with clients on projects that are too big to fail.

Projects where there's a high time cost trade off, meaning they're delivered late and that'll result in a negative financial impact to the client.

They know the challenges that their clients have of all sizes, across all sectors in having several projects going on at once and sometimes no central location in which to understand where they all stand and how do you just pull it all together and integrate things. So that's the setup. And Cody and Paul, thank you both for reaching out and connecting with us and agreeing to come on the show. I think this is going to be a great value, but I'm going to let the two of you kind of reintroduce yourselves if you need to. I'm particularly interested in how you got into this work, but what is it about either one of you that I didn't say that we need to know? Welcome to the show. Go.

[00:06:50] Cody Holm: Yeah, thank. Thank you so much for, for having us. So, yeah, I can answer that question off the bat. So I've been. Patrick, been doing this work for. In my 17th year here, how I got into it, you know, I was some prior roles doing aspects of project management and it was always something that I enjoyed, enjoyed quite a bit. And then I actually just happened to know somebody that was. Worked for PM alliance, was in my personal network, actually somebody I played music with. And as I got to know him more, I was just asking what he did and I was like, man, that sounds exactly like what I want to do.

Are you guys hiring? So. And the rest is history. Sent on my resume that day. Got interview that next week and was hired, you know, the following week. And here I am almost 17 years later doing it. Wow, that sucks.

[00:07:40] Patrick (Host): Yeah. You found your group, you found the thing you're supposed to be doing, I guess.

[00:07:44] Cody Holm: I think so. I think so, yeah.

[00:07:46] Patrick (Host): Paul, how about you?

[00:07:48] Paul Geier: Yeah, really similar in a prior role, it had some aspects of project management.

And I realized, you know, that is.

That's what makes me excited to get up in the morning and had the opportunity to go get my master's from the Citadel in project management. And coming out of that master's program was able to work with an automotive plant in North Charleston, kind of doing the first project there. As that project came to a wrap, started looking for how do I make a career out of this?

Found PM alliance. And you know, that was back in 2016. I've been very fortunate work with, you know, some fantastic folks and fantastic clients and just on some, you know, projects that make me excited to get up in the morning. And it's been a great journey.

[00:08:40] Patrick (Host): I'm always struck by how people who love their jobs and they get so much fulfillment and it's just like they've got a perfect match with their soul. And you're describing it as, you know, excited to get up in the morning for project management. And I'm

imagining a lot of our listeners are going really like, that's like saying I get excited to get up and do my taxes or listen to an academic lecture or something like project management. So many people don't understand really what that concept is. So I'm going to ask you both, because you're talking about the fulfillment that it gives you. What is it about it that lights you up? What's the, what's the concept of project management that gives you the excitement?

[00:09:21] Cody Holm: Yeah.

So it, to me, it boils down to two things.

First of all, as, as you said, we're industry agnostic, you know, so I get to work across several different types of industries and we're really project type agnostic as well, across several types of projects. So any day I wake up, you know, I'm supporting a different, different industry, different type of project. It's incredibly dynamic and it's never boring. Right. I'm meeting new people, learning new things about. It's just discovering new things every day through, through my work. So that's, that's one reason. And the second reason, and more importantly to me it's more fulfilling, is the people aspect of it. And we, you know, when I, when we teach project management, we say really at its core, project management is a people process.

Projects are performed by people and concepts like communication and teamwork and motivation are as big of contributors to success as the, the process and the technical aspects of it.

So working with these people, seeing how teams form and communicate and being a, being a part of that and just the fulfillment I get with, you know, building these, these relationships with folks and the opportunity to meet so many great people, that is, is to me what life is, is all about. Incredibly fulfilling for me personally.

[00:10:46] Patrick (Host): Wow. It's great. Paul, what about you? What, what is it that lights you up? Why, why are you so excited to get up in the mornings?

[00:10:52] Paul Geier: Yeah, I think it's also twofold for me.

One, I love being a part of complex problem solving and working with teams, kind of, kind of attacking and challenging, or attacking and challenging, those kind of things.

The other Aspect is, you know, a lot of times projects can be high stress environments, they can be stressful for folks. And I think through effective project management you can really reduce that stress. And I've had a lot of teams that I've worked with where, you know, six, even three, six, nine months in, you're seeing stress levels come down and, and you're actually, you're helping them. Not only are you helping the project, you're helping improve their day to day. And, and I love that. That just makes me so excited because we all know what stress does to folks and I think if you're, if you're managing those projects correctly and doing some of those key things, you can really improve people's kind of day to day life.

[00:11:55] Patrick (Host): There's a couple things that is, are striking me as both of you talk. One is that one of the ways that I've always liked to describe things or it's a question that I ask a lot of my leaders and coach coaches who are just struggling with just their own time management, let alone projects, just their own, their word, their work portfolio. And I like to ask them, are you driving the week or is the week driving you? You know, you show up on Monday, you know, are you just responding and reacting and like chaotically going about things and, or do you come in, you already know fully this is what I need to do. This is how much time I have to do it. This is how I'm getting it done. These are the people. And I find that when you're driving the week, it is a

lot less stressful. And then it then it's about focusing on the work and not focusing on, oh my gosh, what am I missing and failing on. So that, that's the sort of first thing that catches me. The second thing though I want to hear from you about because Cody, when you said that the part of it about project management that lights you up is the people.

And then Paul, you added on that the idea of how project management helps reduce the stress that comes from managing complex layers and multiple things.

This is a show about leadership. And one of the things we talk about is the difference between management and leadership.

And you know, Paul, you may have heard this at the Citadel Rear admiral Grace Hopper, we quote a lot as having said you manage things, you lead people.

And so it's. There sounds already like there's a blend in your work because what you're managing is projects, which are things. That's why it's called project management. But you're overlaying some leadership components in there. When you talk about the connection with the people and the reduction of stress and leading them toward their goals. And so there's a real leadership dimension in there. I just, I don't know, I'd love to hear your thoughts on if I'm catching that. Right. And how you sort of blend the two.

[00:14:08] Cody Holm: Yeah, no, you're absolutely right. I mean, there's an executional aspect to projects. Absolutely. And that's more where you're managing the work or the workflow, you're managing the tasks.

But just as important is the leadership. And there's a lot of leadership that comes from the project team.

The project manager, they've got to actually lead the team through the planning of the project, the control of the project. And that takes a certain skill set. You've got to motivate the team.

You know, there when you assemble the team, you. It may be folks that have never worked together before, so you've got to lead them through this, you know, this, this forming and storming and norming steps. You may have certain team members that, that are just naturally introvert or quiet, but maybe they've got a lot of the information that you need in order to be successful in the project. And you've got to be a good leader to draw that information out. You've got other folks that maybe want to dominate the, the conversation or the project and you've got to learn how to, you know, get the right information from them to. So, yeah, there's absolutely a lot of leadership and coaching all throughout the process. And you're going to be hit with so many challenges. You know, if there's one thing that there's very few guarantees I can, I can give about projects, but there's one for sure, and that is that your project is going to change and you're going to be hit with things that you never expected. You're going to be challenged with things that maybe were never even on your radar. You know, think of, think of the COVID pandemic, you know, that affected every project that we were working on back in 2020. Nobody anticipated that.

And when those things happen, you know, you've got to have a good leader to help navigate. How do we respond to this? You don't just. If the leadership panics, you know, the whole team's going to panic and then things fall apart. So you got to be calm, under fire. So, yeah, absolutely. There's a lot of, A lot of leadership plays a big role in project management.

[00:16:07] Patrick (Host): When you're working with your clients, are you covering that, like when you're walking them through how to do effective project management and set it up, are you

building in. Do you build into your projects, Buffers, contingencies, tips on how to handle and adapt and flow. Is that part of the consulting in the building when you're building a project in a system?

[00:16:30] Cody Holm: Yeah, absolutely. You know, risk. Risk planning is a big part of it. So we really try to brainstorm at the beginning of the project and all throughout, you know, because projects change. What are the major risks that could potentially impact the time, the budget, or the scope of the project?

And what are we going to proactively do to manage or mitigate or respond to those risks before they come to fruition? So that's one big aspect of it. The other is, you know, you mentioned the word contingency. Absolutely. You will build contingency into, you know, some of your activity durations to account for things like, you know, predictable risks.

You make build contingency into your budget. Absolutely. That's a part of it.

[00:17:20] Patrick (Host): Do you, Are you, are you guys working when you go into a company? Are most of them, Are you working with people who are dedicated project managers? Like, they're, they are that company's project manager and they're helping all the different departments, or do you find that each department kind of has to learn project management on their own? What, what kind of client do you find yourself typically working with? And what do you recommend in terms of staffing for project management in an organization? I know that's a really broad question, but maybe a couple of examples.

[00:17:49] Cody Holm: No, it's. It's a great question. Sometimes we come into organization and it's, it's what you described, where they have a dedicated project management team and we're, we're working alongside that project management team. We've got a dedicated project manager, you know, per each project, and we're buttered right up against them, giving them the right data and helping them through this process. Other times they may not have any sort of project management office at all, and they've pulled somebody from a different department.

You know, I worked on one project where the, you know, the quote, unquote, project manager was the CFO for the organization. So.

And it worked beautifully. You know, it was, it was fine. We just need, you know, to have somebody we're partnering with internally in the organization that's going to help us with navigating. Okay. When those challenges happen, when, when there's things that need to be escalated, how do you feed that up through the organization? When you have issues with, you know, budgeting, finances, resources, all that. You know, how do you navigate that.

[00:18:56] Patrick (Host): That. So I notice often that there are staff members. Again, most of the people that we're working with are non profit organizations, many of them small to medium size and even some of the large ones. They don't have the competencies of project management. I mean, and they, and all, it's not that they're not intelligent or they're not, they're not good planners, they can't think through things critically. But there's a, there's a methodology behind project management back there, probably several. I know you have, I think, a proprietary methodology that we're going to hear about here in a minute. But you know, we work with people who, whose budgets are so limited or maybe their thinking is limited, I don't know. But people who say, well, you know, I'm going to go, I'm going to go take a Microsoft project course to help me with my work because I got a lot of projects that I manage and it's good, go take a course. You know, whatever, whatever the different places might be.

But what would you say to an organization who's got a lot of trade off conversations to have

about their budgets? Where do you, where would you start? If you had a staff that was competent, great with their functions and their programs and their area of expertise, but don't have the science and art behind project management as a discipline, where would you start? Where are two or three places or things that leaders and managers can start with to get them some level of proficiency in thinking about project management?

[00:20:35] Cody Holm: Yeah, so maybe I'll take a step back here and you know, to kind of define how we think of project management. To answer that question, you know, when we think of project management, it's really about managing the, the time, the cost and the, the quality of a project or the scope of a project.

So advice I would give is, you know, first of all, you've got to have a plan. You know, we, we come into a lot of organizations that may be struggling with project management and it's like they've, they've got no plan on paper at all. It's conceptual or maybe even worse than that. They've got four or five different plans. There's no central plan. So everybody is working to their own individual plan. So my, my first piece of advice would be get some sort of a one source of truth plan and get it on paper. And when you start to document things about the project and you start, you start to get alignment when you start to put things on paper and everybody's looking at the same piece of paper, you start to have different conversations.

[00:21:47] Patrick (Host): Hold on. So when you say, are you talking cross department right now? Like, like finance has a project and development has a project, is that what you're about?

[00:21:59] Paul Geier: Yeah, we commonly walk into projects and let's. Let's use a new facility project as an example. And, you know, there'll be a construction schedule, but separate from that, there'll be an equipment schedule, and separate from that, there'll be a talent and resource onboarding schedule. And, and. And they're not connected, and we're not working in alignment, and they. They haven't captured the dependencies and handshakes between those different areas. It's very siloed in nature. That's not uncommon. Patrick.

[00:22:32] Patrick (Host): Okay, I got it. So it's a singular big project, but it. In. But it might involve different departments. It might involve finance and facilities and. Yeah, okay, that makes sense.

[00:22:42] Paul Geier: Yeah, correct.

And kind of capturing all of that. Sorry, Cody. But kind of capturing all of that in one unified plan.

So you understand those handshakes, you understand those dependencies, and now all of a sudden, you know, I'll use. Maybe the construction team now better understands. What does that look like downstream? Right.

How does what they're doing today impact something not in their scope, downstream in the project?

[00:23:14] Patrick (Host): Right.

[00:23:15] Paul Geier: Because you've put all that into one unified cohesive, as Cody said early earlier, single source of truth.

[00:23:24] Patrick (Host): And so that makes me think, when you say one single plan, I'm also thinking about one single system. A lot of the organizations that I coach are using tools like Asana. That's a real popular one. Or, you know, I don't know, Basecamp Trello. There's a bunch of these different software programs. Some of the organizations I know are using it. Well, the

ones that aren't have, in my opinion, in some way relied on the software to manage their project for them.

And rather than know that the software is a tool and a place to use, they still have to manage the projects. And part of the challenge that they have is that not everyone is using it. So, yeah, we have Asana, but I talk to people at sometimes at lower levels who say, yeah, but I don't really use Asana much. I keep my work in Outlook or in Excel, and I just haven't, you know, I don't know. It's a. It's a wonky system for me or whatever the system is. And then the leaders are going, we're having a hard Time with accountabilities and scheduling and everybody not on the same page because we're using three or four different systems. So when you're talking about there being a singular plan, it seems like there needs to also be a singular system, but everybody has to buy into it or it's not going to work. Am I, Is that right?

[00:24:44] Paul Geier: Yeah, kind of build on what Cody said earlier. Project management is controlling time, cost and quality. And you do that through the effective use of people, processes and tools. And kind of the scenario you're describing there, in my opinion is, well, we're using a tool and whether that's Asana or Microsoft Project or whatever that may be, but we don't necessarily have processes in place that are driving how we use that tool, how we update those plans, how we control those plans. And you know, you have to have all three. You have to have effective project management processes that are using, you know, tools that get you the information that you need to allow you to make objective, data driven decisions.

And you get those processes and those tools by having a well trained group of people to, to operate both. So I think you can't really talk about just the tools aspect without also talking about the people and the processes because you have to be balanced in all three, if that makes sense.

[00:26:00] Cody Holm: Yeah. I've got an analogy I like to use on this. And all the time people want to mistake good project management software for good project management. They think, like you said, if you go out and take a good course on Microsoft project, that all of a sudden you'll be a really good project manager.

[00:26:20] Patrick (Host): That's the same with customer relation management software or finance software. They're just tools.

[00:26:25] Cody Holm: Yeah, it's just a tool. And the analogy I use is like building a home, right? You're going to be a lot more effective and efficient in building a home if you have access to power tools. Right. But people have been building homes for centuries, right? And yeah, they're doing it a lot faster and a lot more efficient now. But just giving you power tools does not make you an effective home builder. You still have got to have plans to build against. You've got to have the right resources to actually use the tools, you know. So at the end of the day, the tools are important. Absolutely. But the data that goes into the tools is way more important. If you put bad data into Microsoft Project or whatever project management software you're using, you're going to have a bad project plan.

[00:27:17] Patrick (Host): Yeah. And Paul, when you were talking about processes, you know, I think a term I hear a lot is SOPs, right? Standard operating procedures. And so you gotta have SOPs for these programs. You gotta say, look, when you are a grant manager, your process for getting approval for, you know, taking the next step or spending X money in the budget or going over the budget by \$200 or whatever, this is the process, this is what you have to do. These are the checkpoints. Because I hear that a lot too. I hear we, we, we didn't take the initiative on something because we weren't sure if we needed to get permission from someone. And then the person who they thought they needed to get permission from thought that they did give permission or, or is expecting the person to be more autonomous and take the initiative and not

seek approval for everything because there's not a process for when we need approval and how to get it.

[00:28:18] Paul Geier: Yeah, and to build on that a little bit, Patrick, you know, when you talk about SOPs and kind of that example with grant writing, that's very much an operational process.

I also think there's processes related directly to project management.

How do we identify risks, how do we collect project status updates, when do we deliver those back, how frequently do we do that, how do we define, you know, who can own activities, those type of things?

There's both operational processes that are being used to execute the project, but there's also project management processes.

How do we do this project management function in a way that delivers success?

[00:29:04] Patrick (Host): That is a great distinction and I think makes the case for people to be specifically trained in project management.

Because I think you're right. I think the frustrations I hear more are more the operational processes that are breaking down and they're, I think conflating that with the project management process that they're going through. So that's an interesting sort of thing. I am curious as to PM Alliance's methodology and how it compares. You know, you, you, you've got a specific sort of way that you go about doing it. Is that just sort of the conventional wisdom and traditional, you know, pretty, pretty standard project management methodology that everybody uses this unique. How would you describe what we would call methodology around project management at pm, PM Alliance?

[00:29:58] Cody Holm: Yeah, so it does pull from a lot of traditional project management process. You know, we, we start off with, with defining the project and we get, get sponsorship, alignment and then we get the team assembled, we get the team bought in and really the team has to have some buy in, in how they define the project because they've got to sign up for it, they've got to be accountable for it. And they've got to be willing to be held accountable for it.

And then, you know, we build the project plan in, in a fairly, I would say, traditional manner. You know, it's activity based, but there's a lot of, you know, what I think is different about the way that, that we do it is all the, the little nuances and techniques that go into each and every step and example is, you know, I talked about risk planning. Well, when, when we identify a risk, we always put an owner to that risk, that that risk has a point person. And not only that, but we're going to come back to that point person and whomever else they need to pull in to the conversation and we're going to say, what are you going to do about that risk? And those are going to be activities that go back into the project plan. Okay, so we've got very specific steps all throughout the process.

Another thing that I think makes us unique is the way that we estimate the time aspect of project management. There's all sorts of different approaches to project management in general, but certainly how you estimate the time management. And we think that this is an area where teams can really, really fail if they don't do it accurately. So we already talked about things like accounting for the right level of contingency when it comes to predictable risk and taking all these other factors into consideration. But we use what we call duration based estimates. Another approach out there would be what we call effort based, but we use duration based



because we have found it to be more accurate. And teams are committed, individuals are committed on total elapsed duration. You know, so from the time they start an activity, how long is it going to take them to finish as opposed to hours of effort it's going to take them to do that.

So that's, you know, you mentioned our duration driven methodology earlier. That's really what we mean by that. That's kind of one of the pillars of our approach to this is how you estimate time.

[00:32:26] Patrick (Host): So fill those pillars out. What, what are, what are the, what are the key pillars that make your project management approach or any project management from your view, a success?

[00:32:43] Cody Holm: To me, the how you estimate time is a big part of this. That would be one of the pillars. Another big pillar would be do people.

[00:32:50] Patrick (Host): Usually underestimate the time it's going to take on something or do they usually overestimate it and then they drag it out? What's your experience on that?

[00:32:58] Cody Holm: It is human nature by far to underestimate how long things are going to take? Right. So you know, Patrick, if you had an activity and it was going to take you, say, eight hours of your dedicated time, eight hours of effort to get it done. And I said, okay, what's the duration on that?

It's going to be just human nature. You think, eight hours. You know, I can get that knocked out in a couple days. But when you layer that over everything else that you're doing an eight hour task, that takes you eight hours of your effort, it may take two or three weeks, right? You've got, you're doing podcast tapings, you're traveling to the Citadel, you're doing all these other things. And people tend to not take all of those factors into consideration when they estimate their duration.

[00:33:40] Patrick (Host): Yeah, okay, well said.

[00:33:41] Cody Holm: Yeah, so that's something we, when we, when we capture duration from teams, like, we use prompting language, like, with everything else you have going on, how long is this activity going to take? Like, we know where, we know that's human nature to underestimate.

Some other pillars are control of the project. So a lot of teams will plan a project at the beginning, and they'll plan it beautifully, they'll define it beautifully, the objectives, what they need to deliver, the time frame, the layout, the schedule, and they don't go back and control that project. So as I told you, I guarantee a project will change. You're going to be faced with challenges, you'll have to pivot, you'll have to make key decisions. But if you don't go back and control that project, or what we mean by that is really update it, Keep that project plan accurate. That roadmap that you built at the beginning becomes out of date within a few weeks or certainly within a month or two. And now you're just managing the project somewhat blindly without a roadmap. So that is another big pillar of our methodology is how you control the project. You know, we update our project plans every single week because things change, not even on a weekly basis, but on a daily basis on a lot of these really dynamic projects.

And then another big pillar is appealing to the, the people aspect of this.

And a big part of that, Patrick, is the accountability. And, you know, we don't mean that from a, you know, you, you must get this done from a negative perspective. But we, you know, team members are committed to the project, the organization's committed to the project, and

everybody needs some level of accountability and organization to remind them, you know, I've got this due coming up this week, I've got this due next week. And, you know, so, and so is, is Depending on me to finish this so they can start their activity.

But this layer of accountability exists all throughout the process, from the, the time we define the project, all throughout, you know, the planning and the control of the project.

[00:35:49] Patrick (Host): We have talked a lot on this program about that word accountability. And through reading some, some work by Peter Block, it struck me a few years ago what the word is. It's a compound word, account and ability, which means it's the ability to account.

It's not, it's not a punishment or a punitive term where we're going to hold you accountable, which everyone thinks this is what's going to happen to you if you don't get it done. It's, we're going to help you account. We want you to be able to account for your commitments and your responsibilities and those things. So I love what you said, when you said, when you say accountability, you're not talking about the, the punitive piece of it. You're, you're talking about helping people account and give, and helping with the abilities and software is one thing that increases your ability if you're using it properly, as, as one example.

[00:36:49] Cody Holm: Yes, absolutely.

And we, we appeal to that concept of accountability. You know, some examples when we define the project at the sponsorship level, before we even get the team involved, you know, we, we create a project definition document we call the sponsor document, and we get the sponsorship to, to sign off on that, to put their signature on it.

And, you know, again, that appeals to the accountability of it. Same thing when we define the project with the team, the charter document.

[00:37:23] Patrick (Host): Now, define, define sponsor, by the way you talk about the company.

[00:37:27] Cody Holm: Yeah, yeah. So sponsor to us is the, the individuals within the company that are, are essentially buying the project. They're freeing up the, the resources, the, the money, the people to go out and execute the project. And they've had some hand in, in deciding, you know, we've got this business gap here in the organization and we need this project to go out and fill this business gap.

[00:37:51] Patrick (Host): They're the ones commissioning the project.

[00:37:54] Cody Holm: Yes, absolutely. Yeah, they're the, they're the ones commissioning the project.

[00:38:00] Patrick (Host): Something else that this reminds me of, just timely and relevant for me, too. In the world of systemic team coaching, which is some of what we do, one of the things that we know through some research and some perspective from people like Dr. Peter Hawkins is that teams don't create their purpose. The purpose creates the team.

And so, you know, in project management, what you're describing is there's a commissioner or a sponsor, and then the team comes together and the team then is, is given their purpose. They don't come together and determine their purpose. The purpose has determined the team. The purpose has determined why there needs to be a team who needs to be on the team and what the team needs to do. And that was just an interesting sort of flip of concepts of a paradigm concept for me. As you think of a team coming together and saying, okay, what's our purpose?

It's like, yeah, well, it wasn't to just form a team arbitrarily and come up with some purpose that. I know that. So, interesting aligned process that you got there. So you got the time estimate, you got the control of the project, you've got attendance to the people aspect and the accountability piece as three pillars. Are there more?

[00:39:18] Cody Holm: Yeah, I can certainly keep going. I would say, overall, this layer of just documentation and having the right data all throughout the process, like I said earlier, when you get information on paper and it's no longer conceptual in people's heads or just discussion, but when you actually put it on paper, things change.

People get more specific with their words. So they start to, they start to wordsmith, they start to get more detailed and this, this picture of what the project is starts to become clearer and clearer.

So how we document the project at the beginning, when we define it, and then how we document the project when we put the, the plan together, you know, all the activities, how they, how they relate to one another, but this documentation concept all throughout and how you communicate that, you know, my, my approach in how you communicate project status is, you know, I want, honestly, I want everybody to know about it, that should know about it and that appeals back to this layer of accountability or this pillar of accountability. The more people that know what's going on, one, the, the more accountable the team feels to actually go out and execute what they've committed to. And then secondly, the more people that see it, the more opportunity you have for people to poke holes at it and say, well, I see what you put together here, but did you consider this? You know, because I, you know, I see the order in which you've got these activities executed. And I've, I've tried that before and it doesn't work. But if you have more people looking at the project plan or the project information, you're going to get better feedback on it. So I'd say, yeah, again, this layer of documentation is one.

And then I've got, you know, maybe another major pillar I'd share with you, which is this. Have you heard of the critical path methodology.

[00:41:18] Patrick (Host): Yeah, that.

[00:41:19] Cody Holm: That is a big part of. A big part of our approach is critical path methodology, which is at any given point, you know, from. From where we are at today, what is driving. What is the sequence of work or the sequence of activities that is driving to our end date? You know, we plan at the beginning with the very end in mind, and we keep that very end visible all throughout the project. And we say, okay, what is dictating the completion of our project? What's the sequence of activities?

And you can make so many decisions based on that information. What is on the critical path?

[00:41:57] Paul Geier: Yeah, Cody, kind of build on one of the things you said about documentation there. One of my favorite moments in a project, and it varies, team to team and organization to organization, but one of my favorite moments is how many ever weeks in, you walk into a hallway or you walk into a room and you realize there's a group of teammates having a discussion about the project.

They're using the information from the plan to make decisions.

They're using that objective information to drive what are they doing over the next couple weeks, how. Tackling the issues.

And, and to me, that's the light bulb moment. That's that. That's the moment where you realize, all right, it's clicked for them that they understand this is not just something we're going through. They are now using this information. They're making decisions with it, they are referencing it, they're coming back to it. And, and that is always such a cool moment for me when a project team kind of, kind of hits that point.

[00:43:08] Cody Holm: Yeah, that's. Paul, that's what it's all about. When, yeah. When we see them actually using the, the data that, that they've built to make decisions that are positively impacting the organization. You know, like, like you said at the beginning, that's what gets you excited to get out of the bed in the morning because we know that we're actually helping people see it in real time.

[00:43:29] Patrick (Host): Yeah.

[00:43:29] Paul Geier: Yeah.

[00:43:30] Cody Holm: It's amazing.

[00:43:31] Patrick (Host): Yeah. The critical path thing made me think of something too. I love. I'm. I'm so glad we're doing this because you're. You're taking a proven methodology and affirming some of the things that I kind of intuitively thought before, but you're also challenging some of it. You know, we. I'll sometimes draw an A and a B on a board and a straight line between them. And, you know, here we are, we're at A. We want to get to B. That's the goal. And it's never a straight line. Right? It's never, you never just go from A to B. Everything works smooth. Everything's clockwork, just like you said. There's always going to be the potholes, the pivots, the bad weather, the whatever it is that it's going to throw you off. And so the line curls and curves and sometimes it might even take a step backwards and it goes off to the right and the left and it's all this curlicue.

And that's, that's another thing that we find is you often don't end up at bay. You often, because of what has happened, decide that, you know what, we're going to have to go for C. Or, you know what, C is better. We're going to, we're going to end up here. So your critical path thing, this was, I want to just come back to this. I think it was a really big point. You said at any given time throughout the project.

[00:44:45] Cody Holm: Yes.

[00:44:46] Patrick (Host): So the idea is not just that you create your critical path one time. It's that at any point in time, you have to know what now, what today is. The path from here to there.

I love that.

[00:44:59] Cody Holm: That's exactly right. And that goes back to one of the earlier pillars I mentioned, which is the project control. And that's the whole reason that we have to keep the project up to date, because that critical path.

Paul, I can't think of one project I've ever worked on in my 17 years where the critical path just was stagnant, the entire project, but I could think of several where it changed every single week. We had a new critical path path. And like you said, you may plan to end up at one point at B. And throughout the life of the project, the project changes so drastically that, okay, B is no longer feasible or it's no longer our target. You know, we, we realize now we need to go to C.

So not only do you have a new critical path, you've got a new project plan altogether. Right. But you don't know this unless you're keeping that project plan up to date on a regular basis.

[00:45:53] Paul Geier: Yeah. And Patrick, this kind of comes back to the process as we talked about earlier.

Process. Process is directly related to how you manage the project. Are you looking at that critical path on a weekly basis? Are you collecting and collecting updates in a manner that you can, you can, you know, that critical path is reliable. It's up to date, you know, coming back to those project management processes and having a set of processes that you are following really Allows you to do some of the things Cody's describing.

[00:46:25] Patrick (Host): There's a term in project management that I've used for years and I've heard different versions of it. I have the one I prefer a lot of people refer to Raci. I like to call it RC because to me it seems like the A should come first. But you know, this helps a lot of our clients. The A is in any project or task or whatever. The A is the person ultimately accountable, the point person. The person you go to and say, where are we on this? The person who's, who's just being.

They're the ones that are going to make it happen. They might not be the ones doing the work itself.

[00:47:02] Cody Holm: Yes.

[00:47:03] Patrick (Host): They're just the ones whose job it is to make sure the work happens. And then the R is who's responsible. And those are the people doing the work. Who's responsible for the various parts. And then the. And which, which can be the A. Right. The ACHE might be. Also be a doer, but not necessarily. And then the C is who along the way needs to be consulted up front, in the middle, at the end and consulted. We say, you know, I need someone's buy in, I need someone's approval. I need someone's guidance and counsel and direction and expertise. Subject matter experts, for example, might be who's consulted. We're not asking to do any heavy lifting. We just might need to consult with them. And then the I is who needs to remain informed throughout the process so that they're not blindsided unintentionally by something that the project is doing. You know, the finance department can't be caught off guard. You know, when, when a new system is coming in that's going to change payroll or something like that. So who needs to, to remain informed? We don't need their buy in or their advice. We just need to keep them in the loop as to what's happening. And it's a tool that, that so many of our clients and coaches are finding. Wow. That works in almost every, everything that we're doing. I don't know if that's the tool you use, but it sounds like when you talk about control, the control pillar as well as the, you know, the, the document, the critical path, all of that is the people involved along the way and the specific roles that they play. I'll just throw that out there and respond any way you want to to that model.

[00:48:40] Paul Geier: Yeah. You know, we're not specifically using racy charts most of the time, but those key principles you talked about are built into pretty much everything we do.

[00:48:50] Patrick (Host): Yeah. Yeah.

[00:48:51] Paul Geier: Whether it's who attends and how you hold a weekly status meeting, even down to, you know, who do you send the reports out to on a weekly status? You have to think about those CNI folks, right? You know, who's fallen into the CNI buckets when it comes to, you know, meeting attendance, status distribution, those type of things. And then when you talk about the R and the A categories, you know, when you're, when teammates are taking

ownerships of activities, who should actually own the activity, who should report on the status versus who's doing the work. You know, those conversations in those two RNA categories definitely fall into or definitely contribute to when you're building that plan. Who's actually going to take ownership for this? And are they the person that's just accountable or are they person doing the work and what works best in this scenario?

[00:49:44] Patrick (Host): It's funny where I think I see more breakdown is in the C and the eye.

[00:49:49] Paul Geier: Yes.

[00:49:49] Patrick (Host): That people saying, hey, you didn't ask us before you did this or hey, why didn't, why didn't we know about this? Or you know, you should have asked for my buy in on this or you know, I could have saved you a lot of trouble. It usually isn't, isn't in the A and the R. It's usually in the C and the I where I see a lot of the breakdowns. But that might just be what I'm seeing from my limited view on it.

[00:50:10] Paul Geier: I agree. I think the C and the eye is where a lot of the baker down is. And I think people think that it's complicated and time consuming to keep everyone up to date. And I disagree with that.

[00:50:23] Patrick (Host): Me too.

[00:50:24] Paul Geier: I think with a, you know, 30 minute, well facilitated meeting each week with a, you know, pretty, pretty standard, strict agenda and you kind of hold your points. I, I think you can keep the, the people in the scene, the I buckets, well, well informed and provide them pretty objective, objective data on the project status, what's in flight, what completed, what's upcoming so that they can interject when they need to. And I think you can do that in a pretty efficient manner.

[00:50:54] Patrick (Host): You made that sound so easy. Right, but, but you threw in all those qualifiers that are absolutely critical. Well facilitated meeting, 30 minute meeting, strict agenda meeting. That's like those are the problems too, is, yeah, we're two and a half hours into this and we haven't gotten anywhere. Yep, not well facilitated, not well prepared, not strict, not sticking to an agenda, don't have an agenda of objectives. You're just there to talk about things. And so thanks for say. Thanks for making that sound easy. It is simple, but. But it is, boy, it's a lot of people falter in that area right there.

[00:51:30] Paul Geier: You ought to be able to. And Cody, if, you know, I think you agree with this time, but you ought to be able to effectively control a project with about 45 minutes to an hour worth of a teammate's time each week. You know, half of that being coming to a control meeting, the other half of that being providing a little bit of status, making it, maybe making an adjustment here or there. But once you're planned and once you're into control, you know, if you're spending significantly more time than that, I believe there's a more efficient way.

[00:52:04] Cody Holm: Yeah. Bottom line is if you waste people's time, they're going to stop giving you their time. Plain and simple.

[00:52:11] Patrick (Host): Absolutely right.

[00:52:12] Cody Holm: You've got to have a project management process that is not only really effective and gives you the right data, but it has to be efficient, it has to be lean, and it has to appeal to the fact that everybody's got a heck of a lot going on. And you know, we try to make it real lean and just get, get to the point, get the right data. And when we report out the data, like

Paul said, the. The data has to be easy to absorb and you need to be able to look at it and really within a few seconds have an understanding where the project is. What are like, like Paul said, what, what, what are the major accomplishments over the past week? What are some of the major challenges we're dealing with? What is driving the critical path? And you should be able to do that within 30 seconds.

And if, if you, if you format the data in such a way that, you know, somebody's got to spend five to 10 minutes of their time to actually pull that information out. They're not going to give, they're not going to give you that time and they're going to be uninformed.

[00:53:11] Patrick (Host): Well, that's good. So people listening to this program that tuned into this one because it had project management in it, and this is in your world. Re Rewind this about four minutes and listen to that last section. He was really as I agree and I think in this case efficiency is effectiveness. I mean, that's the whole point. And Charles Adler, I've told this story a lot. I heard Charles Adler speak at a conference once. He's the co founder and former CEO of Kickstarter, and he was talking about, you know, he's a serial entrepreneur and he was talking about projects and he said, I give myself 30 days on anything, any major project, any new business, I give it 30 days and if I, if I haven't done it in 30 days, then I haven't been paying. I'm not focused. It must not, it must not, you know, be important to me. It's not going to work, whatever. And so I cut it off and I move on to the next thing. And that sounds extreme and you think I don't know about that. Different, there's different things to have, different timelines. But it made me think of is meetings. And I thought what if, what if you, what if your organization committed that your staff meetings are 30 minutes and no more, but you prepared for that 30 minutes in advance. You, the time you spend to have an effective meeting happens before the meeting. In my, in my estimation it doesn't, it shouldn't happen in the meeting. If it happens before the meeting, you've well prepared, you're ready to facilitate, you know the objectives, you've gotten the objectives from the other parties who are going to be in the meeting, what they need to get out of the meeting and then you run. And what would happen if, because I hear this, our meetings are two and a half hours. I'll go from one meeting to the next and we don't get anything done. What if you, what if you said we only have 30 minutes? What if your board only had 30 minutes to articulate its three year strategy? Like we don't recommend that by the way, but what would it do to your thinking if you knew you only had 30 minutes for that?

[00:55:13] Cody Holm: It, like you said, I think that would prompt you to spend a lot more time ahead of that meeting preparing and making sure you've got the, the right data and that it's laid out, you know, very specifically and efficiently to, to share with the rest of the team and, and you really hit exactly on our process. Like when we have our 30 minute touch point meeting with the team every week.

You know, Paul, all of our work has really happened prior to that 30 minute meeting. And that 30 minute meeting is just us presenting the data to the team and then giving them an opportunity to maybe poke holes at it or ask questions.

[00:55:49] Patrick (Host): Yeah, Winston Churchill is credited with this, but I think a couple of others are credited with it too. So I don't know really who said it, but something to the effect of, I mean Winston Churchill is credited with saying everything I think, but something to the effect of if, if you want me to speak for five minutes? I need a week to prepare. If you want me to speak for an hour, I'm ready to go right now.

[00:56:11] Cody Holm: Yeah, yeah, no, that's, that's, that resonates. Absolutely.

[00:56:17] Patrick (Host): Or Mark Twain, I think, who said, was it him who said, I apologize for the long letter. I would have made it shorter but I didn't have time. Something, something like

that. I mean, that's, that's really what it is. The time spent on the front end saves volumes of time in and after the meetings.

[00:56:35] Cody Holm: Yeah.

[00:56:35] Patrick (Host): So I love that. That resonates. I mean. Oh, go ahead.

[00:56:39] Paul Geier: Well, I was going to say, I think we see that with the way we plan and control projects, you know, if you spend the right amount of time, as Cody talked about up front, you know, meeting with your sponsors, meeting with your team, getting those, you know, those project documents put together, getting that initial plan put together. Yeah, there's some heavy lifting up front, but if you do that heavy lifting up front, you know, a month into control, you ought to be smooth sailing, man.

[00:57:07] Patrick (Host): Yeah, I want to go another six hours and just get a full on course and seminar here from you guys. This is really good. I want to ask you one more sort of functional question and then we'll, we'll wrap the show up with a couple of softer conversations.

Let's talk about PM alliance for just a minute.

So I'm thinking about listeners out there who are going, oh man, we could really use help from someone like this is it.

You know, I'm thinking maybe they have projects that they would want a company like yours to come in and help them manage. If you're actually the ones managing it or consulting on it or some of them might just say, man, we could just use some, some good training like this, like, like what we're getting on this show and build some frameworks and some, some, some thoughts. Do you. How, how do you best serve the clients that you serve?

[00:57:59] Cody Holm: Yeah, so really both of those things you hit on, plus a little bit more. But kind of our core focus is these mission critical projects that are, you know, like, like we said at the beginning, too big to fail, where they just don't want to take any risk on. They want to make sure they're effectively planned and managed all throughout. That's, that's really most of our, our business.

We do help companies when they've got say 100 projects going on and they just need some central location and some common approach to how those hundred projects are mapped out, you know, and that we call that portfolio management. And that's one of my favorite things that we do, because, you know, imagine an organization where you got 100 projects and you got to go 20 different locations to find those projects, and maybe some of them aren't even on paper. But when we bring some common approach to each one of those projects and get it in. In the same location, in the same format, and give organizations like this control tower view of all the projects, you know, taking off and landing and where they are in flight, man, that is so impactful to organizations. So portfolio management's another big thing. And then you mentioned the training.

Absolutely. We come into organizations and just have similar conversation, what we've had today here, but a little bit more. You know what? We will, step by step, talk you through the project management process.

I became one of our trainers here over the past couple years, and I'll tell you, Patrick, somebody asked me a couple weeks ago, what's your favorite thing that you do? That is my favorite thing that I get to do is teach people how to do this process because the. The approach is so



simplistic that it resonates with everybody. It's like, it makes so much common sense that they're like, wow, great, I can do this.

And then I follow up with those teams that I've trained, you know, a couple, three months into it, six months into it. And even if we're not doing consulting with those folks, it's the impact it's made that, okay, now we've got a common approach to how we're doing, doing project management.

[01:00:07] Patrick (Host): I love the. The. The idea that the training is simple in its concept, enough to. To un intimidate people. Because I think the term project management, it's overwhelming because the projects can be overwhelming themselves. And so the idea of project management, that's this science. I got to go to school for that. I got to, you know, I got to be an engineer. I got to be at whatever it is. But you do simplify, you know, time, cost, and quality. It's a simple concept. Concept, people, processes, and tools to get it done. It's a simple process. You gave us. You give us five good pillars of the work and how you think about it and hit on some of the concepts. So I'm sure that training is super effective. And I like training people, too. So I know the fulfillment that you get. Now that I'm going to ask a couple of questions that I like to ask all my guests, and the first one I'd love to hear from both of you on this, this is kind of just quick, you know, almost rapid fire response. But who's a leader that comes to your mind as someone who has had profound impact on your leadership, your view of leadership, maybe even your life. It can be someone that you know well, it can be someone that doesn't know you, but you've watched them from afar and they've inspired you. But who comes to mind as someone who's had profound impact and, and just quickly, why.

[01:01:26] Cody Holm: My, I've been blessed to be raised by wonderful parents and my, both my father and mother, great leaders, but my father especially was just a perfect example of servant leadership, I would say is what really stands out to me, humble leadership.

But I would have an opportunity to work with him a little bit, you know, professionally in my adulthood and work ethic, just like more work ethic in his pinky than most people have in their entire soul.

So I get, I get, I get all my work ethic and from my father and just such a wonderful example of a servant leader.

[01:02:05] Patrick (Host): Wow, Inspiring. Paul, what about you?

[01:02:09] Paul Geier: Yeah, I have to go with a similar answer. You know, Patrick, you mentioned him at the beginning of the show, but my dad has been such a, such an influence in my life and kind of how I've grown into a leader and really how I got where I am.

Love having conversations with him about, hey, what's your thought on this? How did you handle this? He's got a lot of experience in the non profit world.

You know, obviously you've worked with him through United Way and whatnot.

And he's been a big influence in.

[01:02:40] Patrick (Host): Leadership for me and he strikes me as that unassuming, you know, because he's got the experience and the wisdom and the smarts, but he's down to earth and he's, he's disarming and he's just, you know, he makes you feel, he's authentic. He's an authentic person. So I, I'm glad to know him as well.

Before I ask my last question, I should have asked this. Is there anything else regarding project management or this conversation that you'd want to share with our listeners that my questions haven't given you a chance to talk about or say any key thing that we, that we've missed?

[01:03:18] Cody Holm: Patrick, like you said, we could go on another four podcasts on this. To be, to be honest with you, certainly more to share. I will, I'll take this opportunity. Just to reiterate, you know, at its core, we think project management is a people process. And I'll tell you what I've got a friend that, that is a project management project manager and he came in one day and he said, cody, I created a project plan using chat GPT and for like a split second, Patrick, my heart sunk and I was like, man, am I out of the job here? And then after a split second I thought, no. Project management is a people process. If you create a project plan, you know, using just, just AI or software or anything, nobody's going to be bought into that. And you need that buy in and ownership and accountability to be successful on projects. And you need a, you need a process that appeals to all that all throughout.

[01:04:10] Patrick (Host): Well, I can so, I can so relate because coaching is absolutely a people business as well. And there's AI and coaching right now. I mean there are coaching bots that you can get and they'll coach you, but you're not going to get, you're not going to get the same value out of that. So we're, our conversations are always around. We've got to be able to use AI effectively. It's a great tool for maybe putting a plan together, but it also has to involve the people. It's great for creating some structures, some templates, some starting points, some idea generators.

But you're right, it, it's, it's, it's all about the people. And so I, I appreciate that.

Last question.

For each of you, you're given a megaphone and you're put on top of the highest mountain. And at the base of the mountain are all the leaders of the world. Anyone who considers themselves to be a leader. And they're looking to you for your top tenet of leadership. They want to know what's the most important thing we need to keep in mind as leaders.

What would you tell them.

[01:05:15] Cody Holm: Patrick? My, my approach to leadership has always been how can I help? I'm, I'm trying to model the servant leadership, but how can I help? What does the team need for, you know, me as a leader to make them more effective and efficient. And when, when your team sees that type of leadership, you know, they, it really changes the whole dynamic in my experience.

You know, not only does it demonstrate that you're a caring and genuine person, that you want to help them, but it really opens up in, in my experience, their willingness to contribute when they see that you're wanting to make them successful genuinely and you have, you have to be genuine about it.

[01:06:05] Patrick (Host): Right?

[01:06:07] Cody Holm: So that, that is my advice.

[01:06:09] Patrick (Host): That's great. And it aligns with the story you just told us about your dad that that's that service bent and that being your lens of leadership. I love it. Paul, what's your, what's your 15 second lesson to all leaders?

[01:06:22] Paul Geier: Yeah, mine's probably a little more directly related to project management, but create an environment for your teams where it's safe to tell the truth. And if you don't like the answers they give, give them the tools to change the reality.

[01:06:36] Patrick (Host): Oh, wow, that's a big deal. In our world, we call it maybe psychological safety, but it's deeper than that. It's just the trust, the competence, the autonomy, the value behind healthy conflict and tension and, you know, checking our egos and checking our, our ideas against others.

I love it. Hey, guys. This is really, really great. Thank you. You've contributed what, what I think a lot of people would, would pay for and feel like they really got their money's worth. And so I thank you for that. And I do want to direct people again to the website. It's [pmd-alliance.com](http://pmd-alliance.com) and you'll learn a lot there. And whatever you don't see immediately, there's a way to contact them right on the spot. So do that. I, I think this would be great. I think, you know, companies hire marketing consultants and resource development consultants. They hire fractional people to actually manage their finances.

I, I think this is an area that affects everything in most of the organizations that I work with and I think well worth looking into. Yes, there are other companies out there, but they're not the ones on the show right now. And I do know a little bit about what these guys are doing and I, I'm inspired by the methodology and the, the knowledge and competency behind it. So thank you both. Appreciate you being on the show.

[01:08:02] Paul Geier: Thank you, Patrick.

[01:08:03] Patrick (Host): Lead on, folks.