Survival kit :

Communication skills for Project Managers

The people skills project managers need to get along with the job: active listening, effective talking and group dynamics.

By:

Henry Roux de Bezieux

FIT-Engineer, Masters in Adult Education, Business Consultant and FranceManagement Director.

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1. Why train project managers in communication skills?

In the traditional perspective, projects were viewed as an essentially technical process. The focus was on technical questions like strategy orientations, goals, planning, scheduling, resources, etc.

Not so today.

It is presently recognised that project management involves both a technical and a human, relational, communication process. Project management is about leading people, getting people together, listening to people, persuading people, getting ideas into people’s heads, getting people to share ideas, etc.

In a model like the People CMM (Capability Maturity Model)\(^1\), communication skills are considered essential from level 2 onwards (the “managed” level). The purpose of communication at that level is “to ensure that the workforce has the skills to share information and coordinate their activities efficiently. (...) This process area establishes a culture for openly sharing information and concerns across organizational levels and among dependent units”.

As organizations mature, initial communication skills form essential stepping stones towards more advanced skills: participatory culture and workgroup development at Maturity Level 3 (the “defined” organization). Empowered workgroups and competency integration at Maturity Level 4 (the “predictable” organization). Continuous innovation and improvement at Maturity Level 5 (the “optimizing” organization).

What do improved communication skills mean to project managers? Here are the main answers:

- **Improved communication skills mean improved project acceptance:**
  - Better listening skills mean improved understanding of requirements, user involvement, and thus project design.
  - Better talking skills mean better understanding and less resistance to projects.
  - Better discussion skills mean improved relationships and higher levels of trust.

- **Improved communication skills mean improved team performance:**
  - Openness in communication leads to a more cooperative spirit between team members.
  - Understanding of communication processes eliminates potential sources of error.
  - Sharing of common communication tools enhances team spirit.

Experience shows that communication can also be fun rather than a cause of stress. And that’s something else that was forgotten in the traditional perspective and is considered important today.

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\(^1\) Source: Carnegie Mellon, [http://www.sei.cmu.edu/publications/documents/01.reports/01mm001.html](http://www.sei.cmu.edu/publications/documents/01.reports/01mm001.html)

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2. What is excellent communication?

The great rhetoric tradition goes back 2500 years to ancient Greece. “Communication”, it was considered then, was about convincing your peers by the sheer strength of your oratory powers. An essential skill if you were presenting in front of the Athenian Senate. Or to a modern corporate boardroom today.

A more scientific approach to communication appeared in the late 19th century with linguistics and in the mid 20th century with cybernetics\(^2\). Initially focused on machines (automata, computers) cybernetics was applied to human systems (teams, businesses) in the 1970’s, which eventually lead to the development of so called “3rd generation systemics” (the science of social systems). Well known authors in this field include Karl E. Weick\(^3\) and Peter Checkland\(^4\).

The models in this manual relate these approaches to business communications and project management. Although this section is more theoretical than the rest of the manual, it is recommended reading as it provides useful frames and insights into the “hands on” approaches developed later.

### 2.1. Language: Alfred Korzybsky’s General Semantics.

Born in Poland, Alfred Korzybsky\(^5\) emigrated to the USA where he developed a specific linguistic approach called “General Semantics” in the 1950’s. He contributed 2 essential insights to the field:

1. **“The map is not the territory”**. People’s opinions, ideas, memories and presentations are linguistic maps that relate to reality (the territory) but should not be confused with it. Although maps of the same territory may look alike, each person will produce maps that are slightly or significantly different.
   - E.g.: A situation that is perceived as chaotic by one team member will be perceived as rich in opportunities by another.

2. **Messages are likely to be understood differently by the talker and by the listener.** People carry their own references around with them (memories, contexts, situations they have faced, knowledge acquired, …) and tend to interpret messages in the light of these. Thus, two people with different references can come to vastly different conclusions as to what a message really means.
   - When a project manager says “excellent work” to a team member, he could understand it as meaning “I’m really happy with your contribution” while the team member could understand “he is being nice because he wants to give me more work”.

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\(^2\) The science of information, control and feed-back in both animals and machine. Developed during and after World War II by Norbert Wiener. Led to the development of computers and all other automata presently in use.


2.2. Non verbals : Antonio Damasio and the Descartes error

For a long time, communication was considered a strictly rational process. “Convincing the board” was meant to be a matter of getting the facts and the arguments right.

It is now considered that words are only part of the story. Anybody who is speaking also exhibits non verbals like facial expressions, voice tones, physical attitudes that are consciously or unconsciously picked up by listeners and processed along with the words (albeit at an often unconscious level). Possibly the most vocal proponent of this point of view has been Doctor Antonio Damasio who wrote Descarte’s Error\(^6\).

At this stage, it should be understood that:

(3) **Meaning is about more than just words.** A sentence will be understood differently if it’s said with a smile or with a sulk. Non verbals provide a sort of general context (of trust or mistrust ? Hope or despair ?) within which people interpret what they hear.

- E.g. : Just imagine how many different meanings you can attribute to “that’s right” according to the voice tone and facial expressions it is said with.

(4) **When words and deeds are at odds, deeds will eventually dictate what is understood.** I.e. people will tend to trust deeds over words in the long run.

- E.g. : Managers can cheat employees only for so long. Eventually, the odds are employees will start comparing what was said to what was done and call the shots.

2.3. The nature of consciousness : Piaget’s genetic psychology

Communication has sometimes been considered a tougher science than physics because it’s part of the human fabric. It’s not “out there” like atoms or planets. It’s “in here”, “somewhere in between the two ears”. And as one has just seen, in mental pictures, physical feelings and emotions too.

So communication can’t be properly understood without some sort of a model of what human consciousness is like. What’s an idea in the first place ? What happens in the brain when one is listening to something? According to Swiss psychologist Jean Piaget\(^7\), consciousness is infinitely “reflexive”. Which just means that people have an endless capacity to think and feel and imagine things about situations, and about the thoughts, feelings and imaginations they have already had. His model provides two interesting insights:

(5) **Events are not understood in isolation**, but in a dynamic way, as they stand out of previous events, interlink with other messages and stakes, resonate within the person’s personal history.

- E.g. : Tight schedules will be welcomed by one team member because it makes his work easier. And rejected by another because it’s reminiscent of unpleasant earlier situations.

(6) **New events will confirm or infirm old meanings that the person has already constructed.** Because sensemaking (thinking about things until they make sense) is a time and emotion consuming activity, most people tend to stick to already constructed maps of the world if they can avoid doing otherwise.

- E.g. : People will tend to initially resist projects that are to their advantage if these are based on ideas that initially seem new or strange in any way.

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Communication skills for Project Managers - 6 -
Piaget’s infinitely reflexive consciousness:

Thoughts, pictures and feelings about these thoughts, pictures and feelings

Thoughts, pictures and feelings about these representations

Representations of the event (a linguistic + sensory map)

Events in the world

2.4. Understanding interdependence: 3rd generation systemics

Systemics can be loosely defined as the “science of systems”… Systems: those bothersome, complex, ever-changing, unpredictable, chaotic sets, collections, arrays of miscellaneous elements interacting with each other in ways not always well understood. Mechanical and electronic systems like wrist watches that need to be precisely controlled. Biological and natural systems like the weather and its fabled butterfly effect (how the flapping of the wings of a butterfly over Brazil could cause a hurricane in Texas…). Social systems like that mix of employees, factory workers, clerks, office workers, consultants, clients, suppliers, lawyers, regulators, managers and leaders which are referred to as organizations …

Systemic laws tend to govern the behavior in groups of people like project teams, business units and corporations. Within these, whatever anybody says or does is to some degree dependant on what everybody else has said or done. The way people communicate with one and another dictates a large share of the responses they get. This has two important consequences:

(7) A person’s communication is always rational from their point of view. This may sound surprising since the same communication may sound irrational from the outside. What it means is that people are mostly reacting to influences which, although invisible, are dictating their behavior. Outside influences include other team members, corporate strategy but also family members, friends and foes, etc. Influences from the inside include past memories, reference experiences, hopes and disappointments, undigested emotions, etc.

  • E.g.: People who feel angry about things when they seem to be going well are possibly reacting to earlier, “undigested” experiences.

(8) The response one gets from other people should always be evaluated in the light of the way one has communicated with them. This does not mean that other people’s behavior is a direct consequence of one’s own. People do have a measure of choice! But yes, it does mean one’s own behavior is a contributing factor.

  • E.g.: Are excessive control and managerial incoherence contributing to passive employee behaviour?
2.5. Balancing skills : Porter’s attitudes

Communication is not about one person doing all the talking, and the rest just listening. American psychologist Cialdini\(^8\) showed that the cornerstone to great influence is mutual trust. And that requires balancing relationships out. Giving as much attention to listening as to talking. Being as skilled in receptivity (receiving…) as in emissivity (emitting messages…). To help balance both polarities, the following tool was adapted from Michael Porter’s work, best known for his contributions to the fields of marketing and business strategy\(^9\).

<table>
<thead>
<tr>
<th>RECEPTIVE ATTITUDES</th>
<th>EMISSIVE ATTITUDES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1) Listening</strong> : Simply being present to somebody. Showing concern. Taking time out to listen. Showing by appropriate verbal and non verbal responses that one has heard.</td>
<td><strong>4) Interpreting</strong> : Sensemaking, explaining what things could or ought to mean, saying how things should be understood and seen, saying “this is due to that” and “this will be the consequence of that”, “the situation is like this…” etc.</td>
</tr>
<tr>
<td><strong>2) Questioning</strong> : Reacting to what has just been said, asking questions, getting more details, conducting an interview, finding things out…</td>
<td><strong>5) Directing</strong> : Saying what should be done, giving orders, directing other people, making decisions for other people. Providing solutions, showing the way that should be taken, deciding what should be done, solving a problem, etc. Saying “this is the way you should do things…”, “this is the best solution to this problem…” etc.</td>
</tr>
<tr>
<td><strong>3) Reformulating</strong> : Summing up what has just been said by a neutral statement. “So you think we should do this…”, “So when this happened, you did that…”. Saying something in echo to what has just been said. Reformulating should always be done in a neutral and impartial way.</td>
<td><strong>6) Evaluating</strong> : Passing judgment over, giving feed-back on, saying what’s right and what isn’t, evaluating behaviour and / or results, saying “you are right because…”, “this is wrong because…”, “this is better than that…”</td>
</tr>
<tr>
<td><strong>7) Helping</strong> : Providing moral or material assistance, seeking to help people out, sustain their moral, lessen blows, saying things like “I will always be there to help you”, “things aren’t so bad, I am sure you will come up with something”…</td>
<td></td>
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</table>

None of these attitudes are good or bad by themselves. All of them can come in handy. The point is that overuse of any given attitude (and particularly the emissive ones) tends to throw relationships out of balance.

When learning communication skills, attention should be given to learning both emissive and receptive types of skills.


3. Listening skills : Discovering other people’s perspective

Over the last 30 years or so, the focus in business communication has been on “getting the message out”. Indeed, lots of the present day training programs have been developed by large “communication businesses”, i.e. advertising companies.

Undoubtedly, being able to get one’s point across and persuade others is an asset. But this skill needs to be balanced out. When team members are all bent on getting their point of view to prevail, over-communication appears : everybody’s talking, nobody’s listening. Team spirit invariably suffers.

Discovering other people’s perspective is about understanding what’s on their mind… Giving them a chance to wield some influence… Setting up balanced relationships in which both partners get a fair hearing… Setting up a climate of trust … Being able to handle real issues and face difficulties… Being able to shift the focus of attention from the opinions to the facts, the processes, the meanings, the consequences, the solutions, etc.

3.1. Basics : Active Listening

Listening isn’t just about hearing what is said. People who listen actually do scores of activities in their heads. They make up pictures of what is being said, associate into memories of similar situations, talk to themselves about what is being heard, etc. To test this out, just read the following sentences and notice what pictures come to your mind?

What you say to yourself ? What feelings or atmospheres you are aware of ? Do any personal associations come to the surface ?

• “The moment I looked out of the window, I understood what had woken me. There was a large adult elephant picking its way gingerly through the lodge’s parking lot, it’s trunk outstretched towards the Jacaranda tree at the far end that seemed heavy with fruit.”

• “The meeting was a sail through. The client was highly interested by our new solution. He was already sketching out some of it’s possible applications and promised he would see to it they were tested as soon as possible”.

Educated listeners track various verbal and non verbal dimensions of what is happening:

• The logic being used and how it integrates into the overall picture of what has been said.
• The question / answer relationship. Is the answer to the question a real answer?
• The state the person seems to be in (calm, concentration, agitation, purposefulness, stress, etc.).
• The frames of mind (beliefs, values, attitudes) the person seems to be operating out of.
• The representations (images, feelings, internal dialogue, …) being created within one’s own mind and body.
• Etc.

Uneducated listeners on the other hand are likely to just get carried away by what is being said (and have no choice about it). They tend to confuse the representations in their heads with what the other person said. They tend to project their own feelings and states on the other person. This obviously leads to confusion, misunderstandings, dependencies and difficult relationships.
3.2. Observing : Sensory acuity tools

Sensory acuity is about paying attention with one's senses (eyes, ears, feelings…) while somebody else is talking. Rather than just focusing on words and meanings, sensory acuity helps pick up the somewhat less conscious messages being transmitted non verbally.

What are the main parameters that can be observed ?

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Focused</th>
<th>Defocused</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Dilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breathing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rate</td>
<td>Fast</td>
<td>Slow</td>
</tr>
<tr>
<td>Location</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Amplitude</td>
<td>Deep</td>
<td>Superficial</td>
</tr>
<tr>
<td>Skin Colour</td>
<td>Light</td>
<td>Dark</td>
</tr>
<tr>
<td>Skin Tonus or Muscle Tone</td>
<td>Shiny</td>
<td>Not shiny</td>
</tr>
<tr>
<td>Face: Lower Lip Size</td>
<td>Lines</td>
<td>No lines</td>
</tr>
<tr>
<td>Voice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rhythm</td>
<td>Fast</td>
<td>Slow</td>
</tr>
<tr>
<td>Volume</td>
<td>Low</td>
<td>Loud</td>
</tr>
<tr>
<td>Pitch</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Gestures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voluntary</td>
<td>Hand, arm and head movements, etc.</td>
<td></td>
</tr>
<tr>
<td>Involuntary</td>
<td>Hands twitching, feet tap tapping, eyes blinking, etc.</td>
<td></td>
</tr>
<tr>
<td>Posture</td>
<td>Position of body (back, legs, arms, neck, head…), position shifts.</td>
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</tr>
</tbody>
</table>

What’s the theory behind sensory acuity ?

According to cognitive psychology, when people think of a particular topic or memory, they tend to go into the particular “state” associated with the thought or event. “States” are fairly stable, they affect both the mind and the body and can to a certain degree be observed from the outside.

- E.g. a state of confusion : hands and voice shaking slightly, sweat visible on the forehead, etc.
- E.g. a state of creativity : eyes popping upwards and searching around, voice trailing off, etc.

What’s the point of developing sensory acuity ?

Sensory acuity is used to make guesses at what state a person is in, notice state shifts and more generally take states into account when conducting an interview, chairing a meeting or just being attentive to somebody.

It should be noted that one cannot know somebody else’s state for certain. States often share common observable characteristics with one another (e.g. fatigue and boredom both lead to yawning). It follows that one should be wary of hasty conclusions. In case of doubt, it’s easy enough to state that something has been noticed and ask the person about it.
3.3. Points of view: Perceptual positions

According to the well known biologist and systems researcher Gregory Bateson\(^{10}\), any given situation can be seen from at least 4 points of view:

1\(^{st}\) Position – Self  The usual position of seeing, hearing, and feeling from one’s own point of view. The position needed to speak with authenticity, to present oneself, one’s thoughts, feelings, and responses congruently, to disclose, listen, inquire, be present to another. Being stuck in this position can nevertheless lead to lack of empathy, lack of mental flexibility and listening difficulties.

2\(^{nd}\) Position – Other  position in which one understands, feels with, experiences empathy for and sees things from another’s point of view. Here people feel in accord with others. Being stuck in this position can nevertheless lead to co-dependent responses.

3\(^{rd}\) Position — Meta  The position of stepping back to gain a sense of distance, observe, witness, feel neutral, and appreciate both positions fully. Being stuck in this position can nevertheless lead to being perceived as cold, over-rational, and calculating.

4\(^{th}\) Position — Systems Perspective  The position for understanding the contexts (cultural, linguistic, business, family, etc.) the interactions (the history of the relationship) and the mutual influences that condition the relationship. Being stuck in this position can lead to a lack of drive and focus.

This model is fundamental to project management. Well trained project managers have great flexibility to navigate all points of view. Which confers a good capacity to reconcile points of view and lead people. Here are a few questions that help navigate all 4 perspectives:

1\(^{st}\) Position – Self  How do I see things? What are my goals? What’s the process as I see it? How do I see so and so? What’s the solution from my point of view? Etc.

2\(^{nd}\) Position – Other  How does this person see things? How does he or she feel in this situation? What are their goals? What is the process the way they see it? How do they see each other? How do they see me? Etc.

3\(^{rd}\) Position — Meta  What are the common points between both points of view? The differences? The bridging points? The scope for negotiation? Etc.

4\(^{th}\) Position — Systems Perspective  How is each point of view influencing the other? Each person affecting the other? How did both points of view evolve in the beginning? What’s the dynamic of the relationship? What other influences are conditioning these people to be the way they are? Etc.


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### 3.4. Movie talk : Listening to representational systems

How does one know that a person is using any given system of representation to create movies in their mind? Each system has its own linguistic cues: words and expressions that are specific to each representational system. Learning to listen for these enables one to detect how the person is processing information.

#### VISUAL

<table>
<thead>
<tr>
<th>admire</th>
<th>appear</th>
<th>foresee</th>
<th>scan</th>
<th>attractive</th>
<th>form</th>
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<tbody>
<tr>
<td>see</td>
<td>blurred</td>
<td>gaze</td>
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<td>sparkles</td>
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<td>dawn</td>
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<tr>
<td>stroke</td>
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<tr>
<td>vivid</td>
<td>focus</td>
<td>reflect</td>
<td>watch</td>
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**Expressions:**

- seeing eye to eye
- beyond a shadow of a doubt
- catch a glimpse of
- pretty as a picture
- a sight for sore eyes
- get a perspective
- horse of a different color
- staring off in space
- In person

- appears to me
- mind's eye
- paint a picture
- crystal clear
- see to it
- showing off
- hazy idea
- take a peek
- under your nose

- mental picture
- bird's eye view
- clear cut
- plainly seen
- flashed on
- get a scope on
- snap shot
- in light of
- in view of

#### AUDITORY

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Expressions:

be all ears  make music  be heard  manner of speaking
blabber mouth  pay attention to  clear as a bell  power of speech
clearly expressed  purrs like a kitten  call on  outspoken
describe in detail  rap session  ear full  rings a bell
express yourself  give me your ear to tell  state your purpose  give an account of
tattle-tale  give me your ear to tell  the truth
tongue-tied  heard voices  tune in / tune out  hidden messages
utterly  hold your tongue  unheard of  idle talk
voice an opinion  inquire into  well formed  key note speaker
word for word  loud and clear  

Kinesthetic

angle  grapple  skip  beat  grasps  slip
bends  grinds  smooth  bounce  hard  soft
break  hold  solid  brush  hug  spike
burdened  hurt  stuffed  carry  impression  thick
clumsy  irritate  sweep  comfortable  mushy  concrete
movement  touch  crouching  pinch  trample  crumble
plush  tremble  exciting  pressure  twist  feel
pull  budge  firm  rub  unfeeling  fits
run  warm  flop  scramble  wash  force
scrape  weigh  grab  shaky  work

Expressions:

all washed up  hot-head  be felt  keep your shirt on
boils down to  know-how  catch on  lay the cards on the table
chip off the old block  light headed  come to grips with  control yourself
make contact  connect with  moment of panic  pressure
pain-in-the-neck  cool / calm / collected  pull some strings  hold it, hold on
firm foundations  sharp as a tack  floating on thin air  under handed
slip through  get a hold of  slipped my mind  topsy turvy
get a handle on  smooth operator  get a load of this  heated argument
start from scratch  get in touch with  stiff upper lip  hang in there
get the drift of  throw out  hand in hand  tap into
hands on  turn around

Digital

conscious  know  learn  aware  task  believe
motivate  change  nice  clear  notice  conceive
perceive  consider  process  decide  question  experience
meaning  evaluation  significance  compute  count  account

Expressions:

This makes sense  I understand you  it can be argued this way  this reasoning is wrong
I question his perceptions  the rationale is ...  this doesn’t compute  communication process

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3.5. Questioning : Wording the right questions

Asking questions is such an everyday event that most people don’t give it a second thought. But it’s not as simple as it sounds. Yes off course, questions are about finding things out. What are the different types of questions and how should they be worded? What kind of question should one ask to elicit what kind of information?

Clarifying what one is looking for and wording questions accordingly:

Five different types of questions can be differentiated according to the type of information that is sought:

1• A description (Descriptive questions). “What happened?”, “What did she tell you?”, “What did you do on this trip?”, “How did we get into this situation?”, “When this event happened, how did it start?”, etc. Getting the facts straight is essential. These are the questions that do the job. One can further distinguish in between two types of descriptive questions:
   - The 4W + H: What, Where, When, Who and How: all these questions go after the facts.
   - Process interviewing questions seek to establish how something happened, a situation developed, the history of something (large scale process) or the action strategy (small scale process) - (see further on in this manual).

2• An interpretation, an opinion (Interpretative questions). These questions are not about the bare facts, but about the higher mental representations people carry around in their heads: ideas, opinions, concepts, evaluations, judgments, etc. “What do you think of this?”, “What’s your opinion about...?”, “If this were to succeed, what would it mean to you?”, “How do you think this relates to that?”. Two further subsets of questions can be differentiated:
   - Sensemaking questions. These questions seek to establish the sense, the meaning of something to somebody. E.g. “In the context of your career, what could this mean to you?”. 
   - Relationship questions. These questions seek to establish how a person relates something to something else. E.g. “What’s the relationship between our performance this year and that of last year?”. 

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3. The goal, the purpose, the intention of something (Questions that chunk up). One wants to put a piece of information into context, to understand wider implications, to discover the purpose of something. And one asks “What is the purpose of doing this?”, “What's your intention in doing this?”, “Why are you acting this way?”, “If we reach this goal, what benefits will we get from it?”, etc.

4. The details of something. (Questions that chunk down). Somebody says, “a car”, and one wants to know “what colour?”, “what model?”, etc. These questions are important whenever one wants to establish factual reality.

5. An orientation, a sense of direction for the ongoing conversation. (Orientation questions). The speakers want to frame the interview, bring it to an end, talk about something they have noticed… One of them will say something like “How much time do we have to discuss this?”, “Are you satisfied we have covered the topic?”, “You seemed to be hesitating right now, can I know what it was about?”, etc. These questions are essential to keep interviews on track and defuse potential problems.

All the above questions can be asked in ways that are more or less open or closed:

6. Open questions invite a wide array of possible answers. “How did you react to this situation?” or “What are the next steps?” are reasonably open questions. When confronted with open questions, people feel relatively free to go where their mind takes them, conversations can take creative and interesting turns, people feel like they get a fair chance to express their points of view.

7. Closed questions seek to establish things in clear cut and precise ways. They generally invite black and white answers like “yes” and “no”. “Did you choose to react in such and such a way?” or “Do you agree to doing this as the next step?” are fairly closed questions. They help people make choices and commit to things.

And these in turn can be asked in ways that are more or less clean (respectful) or manipulative:

8. Clean questions. Clean questions are very neutral and do not induce much by way of an answer. They don’t suggest any particular answer, they do not presuppose anything that limits the range of answers, they don’t give verbal or non verbal clues that a certain answer would be preferred. “What do you want to do?” or “What do you think of this?” for instance.

9. Manipulative questions. Manipulative questions are worded in such a way as to induce part of the answer. They are many ways of doing this, like presenting a false dichotomy (“Would you rather do this today or tomorrow?”), getting a negative confirmation “Don’t you think we should do this?”, tag questions “You do agree with this, don’t you?”. These questions are not really about finding things out. They are about wielding power or influence over somebody and planting ideas in his or her mind.
3.6. Questioning : Process Interviewing

“Imagine operations are like some sort of a black box”, generations of managers have been taught, “and what goes on inside is somewhat mysterious...”. In today’s world, knowing the inputs and the outputs is not enough. Black boxes must be opened, processes understood, and process interviewing is just the tool to do the job.

“Process interviews” are one-on-one interviews that produce detailed factual descriptions of processes and events the interviewee has experienced. These descriptions can later be used to better understand the event, learn from it and distance oneself from the emotions associated to it. Process interviewing was first sponsored by Swiss psychologist and cognitive scientist Jean Piaget, and later developed by French researcher Pierre Vermersch from CNRS who in turn borrowed most of the materials from Gusdorf, Pribram, Bandler & Grinder.

In a business setting, process interviews are mainly used for the following purposes :

- **Debriefing**: Finding out what has been done in a certain area or at a certain time... (so as to be able to control, approve, evaluate, use data in decision making process, etc.).
- **Sensemaking**: Piecing together various steps of a process and understanding what causes have been contributing to what effects.
- **Coaching & training**: Finding out how somebody has set out to do something (so as to be able to give feed-back, improve practices and help person get detailed awareness of own actions).
- **Process & organizational work**: Finding out what the process steps are (have been), creating process charts, gathering data about the process (so as to be able to analyse, optimise, reengineer, etc.).

The basic steps of process interviewing are the following :

1. **Explain one’s intention and check for agreement**. This is important because process interviewing is a cooperative process. If attempts are made to force answers, the data thus gathered will probably have little value. Ask for instance: “I need to understand what has happened over the last few days. Is it OK if we spend a few minutes covering that in great detail?”.

2. **Identify the (sensory) context of the event to be remembered with precision**. This is essential for the activation of the right memory circuits in the interviewee’s brain. It is achieved by questions like “When did this happen?”. “Where were you at the time?”. “Who else was there around you?”. “From where you were sitting (standing, etc.) what could you see and hear”, etc.

3. **Get the person to describe the flow of what was done and said in sequential order**, one micro-event at a time... This leads to the progressive unfolding of the process... A sequence of actions and steps that were taken over time. This is where the bulk of the interview happens. Questions follow the pattern of :
   - “What did you start by...?”
   - “And then, after doing X, what did you do (what happened)?”

4. **Lead person to next part of the event or to next event in the same process**. Most processes unfold over many steps, events, days or weeks ...
   - “And afterwards?”; “And then?”, “And then what happened?”
   - “And what was the next event in the process?”, “What was the next step after that...”
   - Once new or different event is found, repeat some of step 2.

5. **Get to higher level of detail**. Interviewees typically start with rather general descriptions. When more details are sought, questions along the following lines will help.
   - “When did you do X, how did you do it...?”
   - “When did you do X, what did you do...?”
   - “When you knew X, how did you know...?"

These questions are sufficient to get started. A lot more could nevertheless be said. Professional process interviewers get 3 to 6 days of training...
3.7. Questioning : Sense making questions

People are mostly educated to think that events have well established (and scientifically proven) meanings. Business is different. It’s about uncertainty: all events have multiple possible meanings from multiple different points of view. What do people really think about a situation? What sense do they make of things? How many different interpretations are there? Are people going with the flow and just repeating what they were asked to believe? Do they harbour any doubts or misgivings?

A lot of business time is spent making sense of events before appropriate action can be taken. Here is a model and a mapping process that helps improve sensemaking.

- **The model builds on Karl E. Weick’s work** and shows how sensemaking happens.
  - Any event is likely to give rise to multiple possible meanings.
  - Each possible meaning in turn has many derived meanings and implies other things at other levels.
  - The sensemaking process tends to weed out possibilities until only one or a few remain.

- **The mapping process comes from Neurosemantics and was designed by L. Michael Hall**. It involves the following steps:
  - Tracing the contours of what one is talking about.
  - Identifying and drawing multiple first level meanings of what the situation means to the person.
  - Exploring the derived meanings along all branches and drawing these into the map.
  - Checking the map by submitting it to the interviewee and asking for feedback and confirmation.

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3.8. Listening skills : A question of attitude

If listening is so easy, why doesn’t it come more naturally? According to Swiss developmental psychologist Jean Piaget14, when people receive new, odd or strange information, their reactions fall into two categories:

- **They ignore, reject or otherwise seek to transform the data** because it doesn’t frame with their prior knowledge, beliefs, experiences, etc. Piaget called this process “assimilation”. Technically speaking, assimilation is the process of using or transforming the environment so that it can be placed in pre-existing cognitive structures.

- **They open a new space within their vision of the world**, they consider a new possibility, they change something round in their way of thinking so as to be able to accommodate the new information. Accommodation is defined as the process of changing cognitive structures in order to accept something from the environment.

Both attitudes obviously have their pro’s and con’s. The first one leads to lousy listening, that’s sure. But the second might not always be sustainable. So listening isn’t all about technique. A lot of it is about openness and a certain willingness to open up to other points of view / closure and a predisposition to discount anything that does not fit with the pre-existing picture.

Closure may seem comfortable. No surprises, no differences, no debates, no controversies, no dilly dallying, no time wasted comparing opinions, etc. Closure has long been considered a traditional hierarchical attitude. “If you are too open”, the saying went, “people won’t respect you”.

Openness is not as easy as it sounds. Being open to technical data is one thing, being able to listen to personal opinions that run contrary to one’s own quite another. Besides, openness is time consuming and yes, it can become counterproductive with people who aren’t fair play. They are willing to tell you all about their model of the world, but they won’t listen or respect yours.

Closure may not be as efficient as it seems. People age, organizations age, they think they know it all, they don’t need to learn. And that’s when innovation stops, bureaucracy wins, conflicts take the upper hand.

Openness may not be as difficult as one thinks. Simple rules go a long way to help:

- Giving people sufficient time to express themselves completely. This can be set up as a rule at the beginning of a difficult interaction. “You get 15’ to present your point of view, and I won’t interrupt or contradict”.
- Reciprocity : everybody gets their turn to vent their thoughts (and emotions). “Then it will be my turn to get 15 minutes... And you have to promise not to interrupt or contradict”.
- Being able to agree about the differences. “Our debate is about X... Our perceptions differ on such and such a point...”. Which invariably underscores that everything isn’t different.

Maybe one should always remind oneself at the beginning of a meeting : what is one’s intention? How open is one willing to be?

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4. Talking skills: Getting one’s point of view across

4.1. Setting the agenda: Framing the interaction

Communication is not only about what happens during an interaction. Oftentimes, it’s about what happened before. How the interaction was framed in the first place. For great communication to happen, people need to agree about what is to be discussed, how it should be discussed, what the value of discussing it is, etc.

Framing is a nice way to set things up in the beginning. Setting a frame means holding “the talks about the talks”, discussing what should be discussed and how it should be discussed.

Framing has three major purposes:
- Paving the way for smooth and efficient communication by setting down the rules and the agenda.
- Creating goodwill between the communication partners.
- Creating the right kind of context to tackle potentially difficult or sensitive issues.

Framing is mostly done in an informal way. If possible, lawyers should be kept out of it! Framing means creating a minimum agreement on the following, as outlined in the above drawing from Berenice McCarthy’s\textsuperscript{15} 4-Mat model.

- (1) Why communication is needed.
- (2) What should be discussed.
- (3) How things should be discussed (With whom? By following what outline? What rules? Etc.).
- (4) Where and when and for how long and over how much time (minutes / days / months) things should be discussed.

In all cases, it is recommended to be clear about what one suggests, to request explicit agreement, to be open to whatever suggestions the other party would like to make. To start the framing agreement, one can ask questions like: “I would like to suggest we talk about this... For such and such a reason... Do you agree?”.

\textsuperscript{15} Berenice McCarthy, \textit{About Learning}, Wauconda, IL: About Learning, Inc., 1996.
Different types of people should be communicated to differently. That’s well established. But how does one decide what style is adequate? Indeed, what are the available styles? And when should each be used?

Everybody’s got his or her own communication preferences and it’s impossible to adapt to all. But minimum flexibility is undeniably an asset. It helps create rapport and goodwill. It helps prevent misunderstandings. It helps get messages across to a wider variety of people.

American psychologist William Moulton Marston\(^\text{16}\) set up one of the earliest, most practical and durable maps of personality types, known by the name of “Marston’s colours”. According to Marston, children develop a palette of emotional and communication preferences as they grow up, and these gradually solidify into the various personality structures of the adult. Nobody’s stuck in any one profile though, and people tend to shift from one to another according to context (who they are with, how one is addressing them, etc.).

The four basic personality types are the following:

- **Red : The Confident.** Pragmatic, energetic, right on target, goal driven, active, challenge oriented, extraverted … When in this profile, people feel rather sure of themselves, ambitious, willing to take measured risks, full of authority. They tend to speak rather loud and energetically. Their gestures are ample and their voice self assured. They will argue their points in persuasive ways, willingly take control situations, express clear cut statements and opinions. On the downside, listening will not be their strong point and they are likely to have a tough time adapting to something that wasn’t anticipated.

- **Yellow : The Enthusiast.** Pragmatic, communicating, open, entertaining, flexible, adaptable, optimistic… When in this profile, people are focused on creating and maintaining great relationships to their environment and the people around them. They will be good at getting acquainted with people, at finding something to keep the conversation going, at entertaining the company, … Their voice tone is lively and flexible, which makes them pleasant to listen to. They are good at moving, gesturing, acting, cracking jokes, telling stories, talking about a wide range of subjects… On the downside, they may seem superficial, unstable or unrealistic. And behind all the talk, where’s the action?

- **Green : The Sympathetic.** Serious, congruent, empathic, sympathetic, friendly, cooperative, open to others… When in this profile, people tend to orient themselves to the needs of others. They offer help, comfort, solidarity, they are good at listening, at building trust and teams, at appeasing conflict and finding solutions to problems. They tend to communicate in a warm friendly way, they are good at putting emotions into what they say. They are excellent at perceiving the moods of others, atReacting to what others say, at listening and questioning others, at focusing on others, their situation and problems. On the downside, change will unsettle these people easily and creativity generally isn’t their strong point.

- **Blue : The Trustworthy.** Thinking, structuring, analysing, understanding… When in this profile, people tend to structure their lives, thoughts and communications in organised and logical ways. Their world is a world of ideas, messages, concepts and possibilities. Emotions are often perceived as a nuisance and have to be kept under control. Their way of speaking will be rather even, uneventful and precise. They are careful about what words they choose, enjoy concepts, ideas, figures, facts, reasonings, possibilities, explaining the logic of things, what reasoning ought to be followed, etc. On the downside, they can be uncomfortable with emotions (both their own and those of others), perfectionist and so caught up with their thoughts that they forget to act.

Each of these calls for a specific type of communication. Direct, precise for reds (“to the point”). Flexible and fun for yellows (“a jolly good fellow”). Empathic and warm for greens (“from the heart”). Well structured and argued for blues (“just be logical”).

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4.3. Movie talk and metaphors : Planting pictures into minds

It's one thing to say “our goal is to increase sales by 37%” and quite another to say “when we get to our goal, the phone should be ringing ever so often with people wanting to make appointments. Anxious people pleading so we can take them as early as possible. People booking weeks ahead just to be sure they can come...”.

Because large tracts of the brain work with images, sounds and physical feelings, neurons need to be fed with the sensory stimulation rather than just abstract data. Just compare what comes to mind when the following is read:

<table>
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<th>Abstract Language</th>
<th>Sensory Language</th>
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<td>• “Mister X and I agreed that we would do this and that”</td>
<td>• “When I got to the meeting with Mister X, I found him poured over vast spreadsheets. It seemed to me he was in a slight state of stress, he was somewhat agitated and his hands were twitching...”</td>
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<tr>
<td>• “The main deliverable will be a full report to top management...”</td>
<td>• “The CEO called me on the phone last week and asked for a full report to top management. He sounded a little out of sorts and unhappy with the whole affair. He said it was not his choice to launch this procedure. But since things had already gone this far, the business now needed to find the adequate response...”.</td>
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Movie talk is about enriching the dialogue with sensory representations.

• Why ? To liven conversation up. To provide pragmatic illustrations. To stimulate the sensory areas of the brain. To create rich (multimodal) representations of something. To improve memorisation.
• How ?
  * When talking, provide a blend of pictures (images of what one has seen, what one plans, how the situation could be, etc.), auditory representations (vivid rendering of dialogues, etc.), kinaesthetics (representations of what was felt in certain circumstances, of what is felt in the present, of what would be felt if...), etc.
  * When listening, invite the other person to switch over to movie talk by adequate questions. E.g. “when this happened, what was it like ? What did you see ? Etc.”.

Metaphors go one step further and weave sensory representations into an interesting and relevant story.

• Why ? To get somebody’s attention. To provide an alternative description. To provide a stereotype for understanding a situation. To give indications about the process of something.
• How ? By telling a story (short or long) that relates back to the topic. “This situation is like what happened in such and such a context...”. “Is this like what happened to so and so ?”. “That reminds me of a time when...”. “A somewhat similar process in a different context would be...”, etc.

Excellent talkers are real artists. They know when to switch in and out of movie talk. When to use a metaphor. Mastering this takes a little time and practise. This way of talking also has a positive side effect : it makes communication more fun. More lively. A metaphor a day keeps the doctor away.

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4.4. Getting feedback: Closing communication loops

The human brain requests closure. Closure is about getting the answers to one’s questions, finding out what the end of the stories are, checking whether commitments have been held, being able to gather coherent information and make sense of situations. Without adequate closure, people will feel left out, in the dark, in a state of confusion, etc. And on the other hand attempt to create their own closure by relying on guesswork, hunches, intuitions, etc. In both cases this leads to frequent projections, interpretations, misunderstandings, miscommunication, discomfort and conflict.

Some 20th century management practices, designed along the “divide to reign” principle made it difficult for subordinates to close loops. E.g.:
- Part of the picture was communicated to each person, but nobody was given a comprehensive understanding of things.
- Real stakes and motivations were left in the dark while “socially acceptable” stakes and motivations were presented.
- Real issues and questions were artfully dodged and side stepped when raised by subordinates.
- Whistle blowing was actively discouraged and whistle blowers mostly hushed up.
- Controversy was generally avoided, even when it was mostly intellectual.

These practices, it was recognised, lead to below average employee involvement and creativity whilst generating above average rates of conflict and workplace stress.

Technically speaking, the idea of communication loops comes from cybernetics and can be illustrated by the following dialogue:

1. Person A asks a question. E.g. : “When are you going to do this?”
2. Person B gets the message.
3. Person B responds. E.g. : “I’ll have it done by Monday”.
4. Person A gets the message.
5. Person A confirms that he’s got the message. E.g. : “OK, that’s fine”.
6. Person B gets the confirmation.

If all 6 steps are present, then the loop has been closed. If one step is missing, then a loop is left open and one cannot be sure what the consequences will be. Maybe person A thinks he’s got the answer to his question, but it’s not the one B gave? Maybe B thinks person A didn’t get the answer (even though he did) and feels obliged to communicate the message again and again? Etc.

In the business context, closing loops is one of the basics of creating trust and goodwill amongst team members. It involves:
- Giving straight and honest answers to questions.
- Setting up briefings and informations flows in such ways that people can gain adequate insights into things.
- Accepting that people remind one of one’s own commitments.
- Having adequate practices to check information and see to it that sensitive topics are adequately discussed.
4.5. Language skills : Wording things right

“Wording things right” sounds like something only lawyers should bother about. It isn’t. Project managers who care about how they are understood should master this skill too\(^1\). Here are the basic rules:

1) The map is not the territory. Words are not the things they stand for. This is true even with simple things like chairs. The word “chair” stands for a whole class of objects that share common properties but can be very different from one another. When it comes to abstract words like “project”, “management” or “communication”, people tend to put these words to an astonishing variety of uses.

- **Consequence #1 : In case of doubt, check words out.** Major disagreements arise when people think they are talking about the same thing and they aren’t. Take a minute to check how the other person means a word, and how that compares to the way you mean it.

- **Consequence #2 : If possible, reuse the other person’s words.** When discussing somebody’s idea, attempt to use their word for it. This will make it easier for them to understand. If somebody is talking about “the office”, don’t say “the workplace”, “the factory”, or whatever. Just say “the office”.

2) There is no such thing as a negative. The logical brain is good at negatives. It understands that when “the appointment is cancelled”, that means “no appointment”. On the other hand, the sensory areas of the brain are not good at dealing with negatives. If one says, “don’t think of a pink elephant”, then the image of a pink elephant tends to come to mind. If one says “don’t worry about this aspect of things” then worry is nevertheless suggested. This is an important point because the sensory areas of the brain are better connected to the action circuits than the logical areas. I.e., whatever is suggested in a sensory mode tends to filter over into action.

- **Consequence #3 : Use positives wherever possible.** Rather than say “don’t think of a pink elephant”, say “think of a blue balloon”. Rather than “this isn’t going to be a tough appointment.”, say “this should be a sail through”.

3) Words translate into sensory representations. Lots of words connect up with images, sounds or feelings within people. Actually, even though this happens both fast and mostly unconsciously, the brain accesses hundreds of pictures, feelings, etc. just in order to be able to understand what is being said. Being aware of this, it’s best to communicate the desired sensory representations intentionally.

- **Consequence #4 : Use visual words when one wants person to picture things.** “Just take a minute to imagine what the situation would look like next year ? Etc.”.

- **Consequence #5 : Use auditory words when one wants person to represent things auditorily.** “When you talk to this person, what would you like to say ? What should the tone of the conversation be?”.

- **Consequence #6 : Use kinaesthetic words for access to feelings and states.** “How good is the boss going to feel about this, I wonder. Is it going to weigh in his mind ? Or will he just shrug if off ?”.

4) Differentiate states and processes. Part of the mind thinks of *things* in a static way. “The chair is up in front of the table” or “The boss has a dynamic personality”. Education is mostly based on this type of thinking which only accounts for 50% of the brain’s potential. The rest of the brain handles processes: sequences of actions, events, pictures that move down timelines... “I saw him put the chair there before the boss entered” or “the boss gave an energetic handshake and then blasted off. I thought “Whoa, what an energetic personality” ... ”.

- **Consequence #7 : Use what is most adapted to circumstances.** Process descriptions provide the best insights, understandings and solutions but they are more time consuming. Ordinary static talking gets to the point and proves faster but with wider margins of error and potential of misunderstanding.

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4.6. Body talk: Being congruent

When people communicate comfortably, gracefully, it’s not a concept. It can be both seen and heard. Most people actually feel it. What are the observable criteria that can be used to recognise whether a message is being well communicated? Whether he or she is entirely there, talking fluidly and with great impact?

The following check-list provides some clues. It relies on the following ideas and assumptions:

- **Communication is a mind/body affair.** Excellent communicators bring their body, their gestures, their voice in as much as their words. And that’s what gives them so much impact.

- **Body language is essential.** A myth has often been circulated according to which body language would represent 93% of a communicator’s impact, and words only 7%. Although this myth has been proved untrue (indeed, stupid), communication is at its best when body language and words go hand in hand.

- **Communication is a two way affair.** One communicates better with a good audience. It’s difficult to expect somebody to be at peak performance if the audience is hostile...

- **The following check-list has not been scientifically validated.** It’s an empirical tool that was set up by the author along with a group of fellow French consultants. It will probably be improved on as the years go by. But it’s a good place to start.

Here are a few tips for the use of the check-list:

- **The purpose of this check-list is to provide feedback.** Help people be better aware of what they do and don’t do.

- **Answers in the left hand column are generally considered preferable** to answers further right.

- **It should always be remembered that communication skills depend upon both content and context.** Content: some people are going to be at ease with certain topics / ill at ease with others. Context: who’s listening? Is the audience friendly or hostile? Etc.

- **It follows from the previous point that performance will vary considerably.** Even professional communicators have their off days. This check-list has no value as an assessment tool and should not be used as such.

- **Ratings of 100% all the time are both impossible and unnecessary.** Average ratings of 50% is sufficient to be considered a good communicator in most circles.
### Check-List

#### What is the communicator doing / not doing?

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<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td><strong>A) Physical Attitude</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1) Verticality</td>
<td>☑ Good</td>
<td>☑ Average</td>
</tr>
<tr>
<td>A2) Openness</td>
<td>☑ Yes</td>
<td>☑ Scared</td>
</tr>
<tr>
<td>A3) Dynamism</td>
<td>☑ Fluid</td>
<td>☑ More or less</td>
</tr>
<tr>
<td>A4) Emotions</td>
<td>☑ Under control</td>
<td>☑ Excessive</td>
</tr>
<tr>
<td>A5) Use of space</td>
<td>☑ Excellent</td>
<td>☑ Satisfying</td>
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<tr>
<td><strong>B) Voice</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B2) Rhythm</td>
<td>☑ Flexible, appropriate.</td>
<td>☑ Sometimes appropriate.</td>
</tr>
<tr>
<td>B3) Diction</td>
<td>☑ Good</td>
<td>☑ Average</td>
</tr>
<tr>
<td>B4) Tone</td>
<td>☑ Varied</td>
<td>☑ Average</td>
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<tr>
<td><strong>C) Gestures &amp; Expressions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C1) Gestures</td>
<td>☑ Expressive</td>
<td>☑ Artificial</td>
</tr>
<tr>
<td>C2) Movements</td>
<td>☑ Justified</td>
<td>☑ Random</td>
</tr>
<tr>
<td>C3) Nervous movements</td>
<td>☑ None</td>
<td>☑ Occasional</td>
</tr>
<tr>
<td>C4) Eyes</td>
<td>☑ Present</td>
<td>☑ Empty, absent.</td>
</tr>
<tr>
<td>C5) Facial Expression</td>
<td>☑ Open</td>
<td>☑ Closed</td>
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<tr>
<td><strong>D) Words &amp; Behaviour</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D1) Verbal / non verbal coherence (authenticity)</td>
<td>☑ Excellent</td>
<td>☑ Average</td>
</tr>
<tr>
<td>D2) Use of “I”, “you”, “we”...</td>
<td>☑ Fluid and appropriate.</td>
<td>☑ Occasional fixations.</td>
</tr>
<tr>
<td>D3) Delicate topics</td>
<td>☑ Are talked about in a direct professional way</td>
<td>☑ Are talked about with difficulty</td>
</tr>
<tr>
<td>D4) Coherence between words / deeds</td>
<td>☑ Excellent</td>
<td>☑ Approximate</td>
</tr>
<tr>
<td>D5) Listening capacity</td>
<td>☑ Excellent</td>
<td>☑ OK</td>
</tr>
<tr>
<td>D6) Adaptability to the other person and flexibility</td>
<td>☑ Excellent adaptability and flexibility</td>
<td>☑ A certain measure of adaptability</td>
</tr>
<tr>
<td>D7) Initiative and creativity in communication</td>
<td>☑ Manages exchange in creative appropriate way.</td>
<td>☑ Occasionally manages interaction.</td>
</tr>
</tbody>
</table>
5. Group dynamics : Navigating the system

5.1. Pacing and Leading : Adapting to others

Pacing and leading are non-verbal phenomena that happen quite spontaneously\(^1^8\). When two persons have a discussion of any length, they tend to a change of body postures, voice tones or rate of speech, etc. Although people are mostly not aware of this phenomenon, it can be demonstrated time and time again in many settings. Project managers need to know about it so as to become aware of the non-verbal dynamics of a meeting and be able to manage this side of things.

**Definitions of pacing and leading**

Two persons communicating with one another are said to be “pacing” each other when their non-verbal parameters (posture, voice, gestures,…) have adjusted in such a way as to become quite similar. One also says that these people are “synchronised”, that they are in “rapport”. Most of the time this is a non-intentional phenomenon.

- **Pacing**: Example 1. When he walks into the meeting, the project manager is talking loud and fast, making big gestures. He sits with legs and arms flung open wide. The other person speaks softly, leans forward, has arms and legs crossed. At that stage, these two have *not paced* each other.

- **Pacing**: Example 2. Ten minutes later, both people are leaning forward, discussing something on a piece of paper. They both have their legs uncrossed and are speaking at similar speeds with similar tones of voice. They have *paced* each other, they are synchronised.

One person is said to be leading another when a change in the non-verbals of this person is followed by an equivalent change in the non-verbals of the other. Leading applies both to one on one and group situations. According to circumstances, it can happen instantly or over a short period of time.

- **Leading**: **An example**. A few minutes later, the project manager feels stress. His voice is stifled at the throat. His chin muscles and arms tense, his gestures are abrupt. The other person then feels his own arms and jaw tensing up, he is being lead. The project manager then focuses on his breathing and starts relaxing. Ho presto, the other person starts relaxing too. The project manager has just been leading.

**Why learn about pacing and leading ?**

Whether intentional or not, pacing and leading happen on an ongoing basis during all sorts of meetings. Project Managers should be aware of it and be able to avoid the following pitfalls:

- **Excessive pacing** tends to blur differences between self and other, to abolish distances, make autonomous thinking difficult. This may (or may not) be appropriate in a *love* relationship, but it certainly

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\(^1^8\) Both NLP (Neuro-Linguistic Programming) and Neurosemantics have mentioned pacing and leading extensively. It seems that the concept of pacing originated with the famous American psychiatrist and storyteller Dr Milton Erickson. NLP however has missed a fundamental point : pacing is essentially spontaneous. It happens naturally in most cultures and does not need to be deliberately set up.

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isn’t for professional relationships. Managers should know how to decrease pacing so as to maintain adequate distances between self and other.

- **Insufficient pacing** can lead to insufficient trust. If trained in communication skills, project managers can give nature a little help and deliberately adjust some of the non verbal parameters of their communication so as to reach minimum pacing.

- **Brutal interruptions of pacing**, whether intentional or not can lead to a sudden feeling of estrangement and interrupt the free flow of conversation. Although these mishaps can be repaired, they should if possible be avoided.

## How pacing happens

Spontaneous and deliberate pacing happen in one or more of the following channels:

- **Physiology** : “The other person looks like me, I look like him or her”. This type of pacing can be very powerful. Indeed, it’s easy to observe this happening between friends sitting at the terrace of a café, but it sometimes is too powerful and can be felt as intrusive if used too deliberately. Physiological pacing relies mainly on the five following parameters:
  * **Posture**. The position of the body, and specifically, that of the spine (upright, leaning forward, backward), of the arms and legs (open or closed (crossed)).
  * **Gestures**. Reproducing the same type of gesture associated to the same type of meaning. This has to be done when one is oneself speaking (and not at the same time as the other person).
  * **Face expression** : muscle tension, including lips, forehead, eyebrows, jaw muscles…
  * **Eye lids** : Adjusting speed, rhythm, frequency of beating.
  * **Breathing** : Adjusting rhythm, amplitude, location of breathing (top, middle, lower part of lungs).

- **Auditory**. “My voice is like the other person’s voice, his voice sounds like mine.”. This channel is a lot more discrete than physiology. It’s both powerful and elegant and can be modulated almost word by word. It relies mainly on changes of the following five parameters:
  * **Voice volume** (loud - weak)
  * **Voice tone** (high - low)
  * **Voice speed** (fast - slow)
  * **Voice rhythm** (regular - irregular - etc.)
  * **Voice melody** (nasal - guttural - etc).

- **Predicates and Representation systems**. “The other person and I are using the same kind of words belonging to the same type of representational channel: visual words, auditory words, kinaesthetic words, digital words, …”. This channel is not directly non verbal, but it does refer to the sensory dimension of language. It can be used in two very specific ways:
  * Simply reformulating what the other person has just said means… using the same key words… And thus has a distinct effect of pacing.
  * Changing the type of words one is using, e.g. going from visual descriptive words to digital words is an efficient way of loosening, or even interrupting rapport.

When deliberately pacing someone else, one will adjust one or a few of the above parameters to make them similar to that of the other person. This is useful when both people have very different non-verbal attitudes and spontaneous pacing cannot set in. The more similarities, the stronger the pacing effect. Pacing can be uncomfortable to the other person if it is done in a way that is too deliberate and visible. If one just allows natural pacing to set in over time, this will never feel uncomfortable.
How leading happens

Leading can happen in some or all of the above channels. It happens when one person gently shifts his or her posture, voice or predicates, and the other person follows suit. However, **leading only happens when there has been pacing before hand.** It’s a matter of hooking the wagons to the engine before being able to pull the train.

If done in a brutal way, leading can interrupt the conversation and create a glitch... Leading has one major drawback : it creates artificial consensus that generally will not survive meetings for long.

The indicators of pacing

How does one know whether one pacing has happened ? The following are useful, albeit empirical indicators :

- A physical feeling of “comfort”, “warmth”, “togetherness”, and in some cases, “intimacy”. Although highly subjective, these feelings can sometimes be felt as some sort of warmth along the mid plane of the body running from the throat to the navel.
- A slight increase in skin colour (reddening of the face). This can be observed on the other person’s face, and / or felt on one’s own face as a slight feeling of warmth.
- Verbal comments from the other person indicating some perception of familiarity :
  - “Don’t we know each other ? Where did we meet before ?”
  - “I didn’t think I would tell you about it, but since we seem to understand each other so well...”
  - “I didn’t think somebody like you could get this so easily...”
- An observable tendency of both persons to lead each other. I.e., shifts in position, state or voice tone of one person will be followed quite unconsciously by similar shifts of the other person.

The interruption of pacing

Excessive pacing, although spontaneous can become a nuisance. **Pacing should be interrupted when :**

- **States of fusion are being reached** – intense states in which I / you boundaries seem to dissolve. These are generally not adequate in business contexts (and most other contexts too !).
- **In the face of excess emotion.** E.g. with somebody in a state of great anger or agitation. Too much pacing in such a case can lead to great discomfort to the other party.
- **Minimising influence.** Because pacing leads to greater openness and influence, it should be minimized when one seeks to minimize openness to the other person and influence on the other person.

Because progressive changes in the non verbs can result in leading, pacing should be interrupted quite fast and / in a more permanent. Shifting predicates… Shifting voices… Shifting body postures will generally do the job. Changes that are too sudden may however come across as brutal and result in a sudden feeling of estrangement.

No use over doing it

Whether one seeks to increase or decrease pacing, it’s no use overdoing it ! Pacing happens quite naturally most of the time, and it’s no use pushing it to extremes. If efforts are being made to pace at all, these should be interrupted as soon as minimum indicators of pacing are present.
5.2. Group dynamics : Satir's positions

When relating to one another, people tend to adopt a wide variety of attitudes depending on who they are relating to, what they are talking about, what the other person’s attitude is, etc.

When seeking to understand communication, positioning is a key parameter for a number of reasons:
- It’s readily observable with a minimum of training.
- It provides essential clues about the dynamics of the relationship.
- It’s a strong determinant: positionings will tend to govern what is said, how it is said, the non-verbal communication, etc.
- It’s a systemic parameter. Changing one’s own positioning is likely to lead to changes in the other parties positioning.

Research by American Psychologist Virginia Satir10 tends to show that interpersonal positionings are influenced by at least 4 factors:

- **The topic being discussed.** Certain topics call for more data and intellectual input. Other topics generate tensions and conflict. Etc.

- **Personality.** Certain people are naturally more extraverted… More introverted… Better at jokes or at deep thinking… People however tend to have more than one facet to their personality and will express the one or the other according to the positioning they choose.

- **Culture:** One says that Mediterranean people gesture more than Anglo-Saxons (but surely, M. Bean is British, isn’t he?). Culture governs the way conversations are lead, non-verbals are expressed, what is deemed admissible and what isn’t, etc.

- **Positionings of other stakeholders.** Groups can’t accommodate much more than one boss or one cheerleader. If these positions are occupied by strong personalities, other people will go for differentiated positionings. In the same way, having a depressed person in a group can lead to other people expressing sympathy… Or exasperation.

This last factor is highly systemic. One’s positioning depends on other people’s positioning, which in turn depends on one’s own…

Based on the observation of small groups, Virginia Satir developed a positioning model that has been reworked and expanded to include the 6 following archetypical “positions” : Bossing, pleading, distracting, computing, levelling and Meta.

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Here are a few keys to recognize each position:

- **Bossing**: This position expresses authority, be it fair or unfair, domineering or humble, autocratic or participative, etc. People with this positioning tend to speak with firm, well positioned voices, to breathe deeply, to gesture in precise ways, to be grounded if calm and energetic if angry. Characteristic words include: “one should”, “you must”, “this is the situation”, “these are the facts”, “my decision”, “our decision (but I’m the one wording it)”. On the positive side, this position provides security and leadership. On the negative, it can be dictatorial and push other stakeholders towards passivity or rebellion. People in this position tend to access their decision making skills better than their listening skills.

- **Pleading**: This position expresses relative weakness. The person realises there’s a problem, understands that the real centres of power are elsewhere, considers self not quite up to the task or just feels plain intimidated… People in this position tend to speak in soft, hesitant or even whiny voices. Their eyes will either be shifty or beseech. Their verbal statements are likely to express lack of responsibility (“it wasn’t me”); demands (“please give me another week”), flattery (“You’re so good to me”) submission (“I’ll do it exactly as you want”).

  **Appeasing** is a variation of this position. Appeasing is about being turned towards the satisfaction of the other’s needs, helping others, appeasing conflicts, being attentive and responsive to others, etc. “I understand you”, “It’s OK”, “Let’s just talk about this peacefully and see what we can do…”

  **Rebelling** is another variation. It looks like the opposite of pleading: being defiant, rude, provocative, excessive, insubordinate, vindictive, talking loud, talking dirty, etc. But the apparent show of aggression builds on low self esteem…

  On the positive side, **pleading** elicits help and support from the environment. On the negative, it creates dependence, can be perceived as irritating and push other people to become more bossy.

- **Distracting**: Movement, emotion and creativity are the key words of this position. People in this position will gesture, exaggerate, crack jokes, respond with humour, have unexpected responses… They will be great at changing the subject, wiggling their way out of tight places, humouring people, etc. Communication is likely to be rich, unexpected, emotional. Loud and fast talking are quite likely. There’s no getting bored around somebody in this position, but too much can sometimes be too much.

  On the positive side, this position is great to get people, situations and events moving. Things are made to happen, people are made to react, other people’s emotions and states can be switched around, creative and unexpected outcomes can be made to happen. Too much distracter can get on people’s nerves. Some will think jokes are not always appropriate. Shifting into distracter mode is sometimes used to avoid confronting real issues, and it proves counterproductive for all.
- **Computing** : This position is about being rational and logical. People in this position tend to set emotions aside, use abstract words and focus on processes, outcomes, assumptions, reasonings... Voice tone tends to be rather flat and unexpressive. Gestures, if any, will be small. Verbals will reflect mental activity “I am thinking of”, “the next step will be to plan our process” and inner dialogue “I was just telling myself that...”. This position is widely held in the business world. Indeed, a lot of further training is about being able to think and talk in these ways for protracted lengths of time.

On the positive side, this position is ideally suited to thinking things through and impressing one’s audience with superior mental skills. On the downside, it’s perceived as rather cold, calculating and can get downright abstract, hazy and un-pragmatic.

- **Levelling** : This position is about saying things in a perfectly congruent and flowing way. When levelling, words and facial expressions match perfectly, the person is perceived as honest and sincere, feelings are shown without becoming intrusive or excessive, the relationship flows freely and easily. When levelling, people will be able to talk freely about all dimensions of what is at hand : the task and the issues, but also themselves, the other person, the relationship, etc. When levelling, anything that is said is a “truth of the person at that moment”. Criticism can be expressed, but it will not seem threatening or blaming. Joy and aliveness will seem both congruent and appropriate, etc.

On the positive side, levelling is the only position that stands a chance of building real bridges, healing ruptures and breaking impasses between people. Levelling relationships are experienced as extremely worthwhile and tend to contribute to the resources and sense of worth of all concerned. On the downside, levelling is difficult or impossible to initiate with somebody who is bent on lying or dissimulating. It also takes a sense of self worth and correct communication skills.

- **Meta** : This position has been drawn in the middle of all. Indeed, “being meta” is about being attentive to what is happening rather than being 100% in the flow of events. People in a meta position will be observing what is happening, occupied thinking about it, seeking to understand it, feeling things about the situation, etc. There are obviously many ways to *think* and *feel* about an ongoing situation. To one person, going meta may mean “comparing this situation to a past one very much like it...” and to another “trying to guess how one’s present behaviour has affected other people’s attitude...”. People in a meta position will tend to ask questions that show they are attentive to the ongoing process. “I don’t know how to interpret your silence...”; “How can we discuss this delicate topic ?”, etc.

Most people learn to go meta only later in life. It’s a great position to understand ongoing processes, make sense of situations and find creative ways of making things happen. It’s also helpful in getting past one’s spontaneous first reactions and accessing more appropriate (but less immediate) reactions. On the downside, people in the meta position can seem aloof, distant and lacking in spontaneity.
5.3. A systems approach: Checkland’s Soft Systems Methodology

Created by the British Academic Peter Checkland, Soft Systems Methodology is an innovative approach to project design and project management. A must for dealing elegantly with complex situations.

Do this, do that, think of this, think of that… The management game is about running from one spot to another. Things get tricky because management situations are so unstable. In this ever-changing environment, yesterday’s solutions tend to become tomorrow’s problems. Goals change and disappear …

In an attempt to make sense of this type of volatility, Soft Systems Methodology (SSM) represents “a structured way of dealing with confused issues and situations”. This approach was developed by British researcher, Peter Checkland²⁰, who started off working on hard systems and operational research. SSM soon evolved into a distinctive approach with its own toolkit and got its name from its focus on human and social systems with their share of subjectivity, unpredictability, volatility and disorder. How does one play the game when the rules aren’t well established? Soft Systems Methodology’s ambition is to help organisations make collective sense of the situation.

Controversies: Get two opposing teams and the game is on

Controversies provide the Soft System Methodology’s main fuel. How can sense be made of a confused situation? Throw in a controversy. How to determine which goals are worth pursuing? Just set up a controversy. How to choose the best action plan? Controversies again!

There’s nothing academic, however, about this type of debate. To ensure that the debates are meaningful, SSM makes use of specific visual tools that can be used as a basis for discussion. Each of these charts, diagrams, drawings and representations is likely to present one of a few alternative points of view.

> Managers and decision makers are encouraged to express their points of agreement and disagreement.
> The very presence of multiple points of view frees up speech and empowers people to present bolder suggestions and projects.

Although Soft Systems Methodology generally requires somebody in the role of “Master of Ceremonies”, the ingredients of the debate itself do not need to be contributed from the outside. They can come from a variety of sources:

> The members of the project team, the select few.
> Management, with or without the help of a coach or consultant.
> The very actors and clients of the work process, the stakeholders of the situation themselves.

²⁰ Peter Checkland, Soft S. A simple activity model depicting the way SSM charts are used
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Activity models : Remember games are about action

Management is not for ayatollahs and philosophers. So as to make sure that SSM’s debaters keep their feet on the ground, SSM relies on activity charts directly inherited from reengineering and organisational analysis.

> Process charts show the flow of what people do, and how their work transforms inputs into outputs.
> Quantifiable indicators supplement precise measures to quantify things.
> SSM’s focus is on simplicity. Charts are essentially communication tools.
> Charts should be corrected and redrawn as the debate changes and opinions evolve.

Causality charts : Think in circles so you can walk straight

If games were straightforward, they wouldn’t be fun. A good game has its ups and downs. Its decisive moments and its unpredictable reversals. The best players understand how to stay a few moves ahead of the game.

Causality charts are diagrams that represent the logic of a situation. Where are the causes and where are the effects? What connects apparently unrelated phenomena? What are the subtle connexions? The long term ones? How are they woven into systemic circles: one phenomenon ends up being its own cause. “Wealth attracts wealth”, as the saying goes. “Poorly debated decision making” can for instance be shown to lead to “Ill planned actions”, etc., as in the example below. And ultimately full cycle back to “poorly debated decision making”. When things behave along such circular lines, it’s generally confusing. Typically, each business function and unit will have its own, fragmented causal map. By linking these and closing the circles, SSM ensures no such bugs will deteriorate the reasoning or serve as a basis for ineffective (counter productive) action.

Who are we playing with? Going after the more subtle dimensions

Sports is an outdoors activity. And really confused situations tend to happen on slippery playing fields. SSM uses specific types of maps to go after the more subjective (and subtle) social, psychological and political aspects of things. Roles maps show how the various actors and institutions are positioned. Cultural maps describe the mostly unsaid do’s and don’ts of the organizational culture. Value maps chart those abstractions that drive behaviour. Political maps deal with power, stakes and territories.

It’s a gentleman’s game

Wasting time is not a popular sport in the corporate world. And yet this is what so many corporations end up doing time and time again. “Let’s rush this thing through and get to the action” the managers chime in. OK, OK! “What’s the rush?” By structuring projects and decision making around lively debates, Soft Systems Methodology starts off using up valuable time. And it produces solutions that are usually easier to implement, do not drum up much resistance and end up saving eons of valuable time.

SSM can’t be played without a minimum of honesty. If cover-up, fraud or deceive are the names of the game forget SSM. There won’t be a valuable controversy and nothing will come of it. Remember, SSM wasn’t invented by the politburo. It’s a gentleman’s game.
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