Field Personnel to Project Managers

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Agenda

• Career Progression
• Personal Skills
• Business Skills
• Communication
• Leadership
Career Progression
How do Technicians Become Project Managers?

- Demand
- Promotion/Recognition
- Desire
Field Personnel to Project Manager

1. Awesome! I’m a project manager!

2. Wow, I didn’t expect to work this hard.

3. Why can’t I get anything done!? I’m always putting out fires!

4. What did I get myself into?

Field Personnel Expectations

• Do less work
• Make more money
• Less stress
• More time off

Company Expectations

• Perform as well as a project manager as he or she did as a technician
• Customer satisfaction
• Technical skills translate to business skills
Hands-on & Task-Oriented Skills

Stages of Responsibility

Why do Field Personnel Fail at Project Management?

• Unrealistic Expectations
• Little to no Training
• Lack of Mentoring
• Managing Former Peers
• Does not Understand Responsibilities
Transitioning to Project Manager

- Set Expectations
- Understand Responsibilities
- Provide a Mentor
- Provide Project Management Training
- Provide Business Training
Personal Skills
Forest for the Trees
Time Management

• Established Set of Rules

• What am I doing that
  • I don’t have to be doing at all?
  • Can be done better by others?
  • Can be done sufficiently well by others?

• Priorities
Time Management Tip
Ivy Lee Method

- Six most important tasks
- Prioritize in order of true importance
- Concentrate on first task until complete
- Move on to next task
- Move unfinished items to new list
- Repeat process
Time Management

Time Mapping

• Visual Diagram of daily, weekly, and monthly schedule
• Create blocks of time to accomplish tasks
• Can be used with the previous time management tip

Ethics

- Moral Principles, Values, and Beliefs
- Used to Analyze or Interpret

Why are Ethics Important as a Project Manager?

• Ethical Dilemmas
  • Change reports for customers
  • Withhold bad news
  • Change test results
Why do New Project Managers Need Ethics Training?

- Utilitarian
- Justice
- Practical
- Moral Rights

Business Skills
Financial

- Estimating
  - Create
  - Validate
- Controlling
  - Budget
  - Reporting
Estimating

- Create
  - Drawings, Specs
- Validate
  - Review
Controlling

• Budget
  • Creating

• Reporting
  • Earned Value Management
Legal Expectations

- Contracts
  - Authority
  - Change Orders
- Process
Risk

Identify

Analyze

Response

Monitor/Control

Risk Management

Communication
Verbal

- Field Personnel
  - Most Used
- Project Manager
  - Public Speaking
  - Least Acceptable
Taking Notes

- Project Notebook
  - One per project
  - All project information
- Email
  - Historical
  - Legal
Communications Assistance

- Free Publication
- Covers
  - Writing
  - Speaking
  - Email
  - Meetings
  - Grammar
Company Expectations

- What should be on all communications?
- What forms are acceptable?
- What can be communicated?
- When can communications be sent?
Conflict

- Resolution procedures and techniques
- Sequence of events
- Minimize the conflict
- Use problem solving

Managing Peers

- Tread Lightly
- Distance Yourself
- Be Engaging
- Authority Through Competence

Leadership
Leadership

• Borders
• Objectives
• Development

Delegate

- Project Team
- Growth
- Acceptance

Mentoring

• Formal Program
• Resource
• Challenges
Conclusion

- Define and Manage Expectations
- Provide Skills Training
  - Personal
  - Business
- Leadership abilities
  - Provide a Mentor
Questions?
Thank You!

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