

PMI Oregon Conferences September 2022



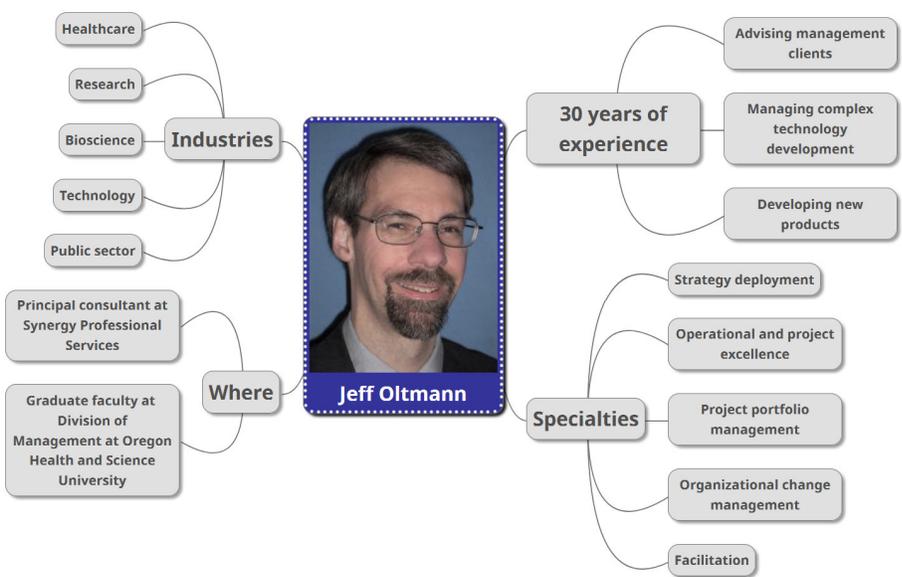
Techniques for Project Managers

HOW TO CREATE PARTICIPATION AND PSYCHOLOGICAL SAFETY

- This will be interactive, so make sure your microphone works
- Presentation and resources at www.spspro.com/pmi-2022

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Industries

- Healthcare
- Research
- Bioscience
- Technology
- Public sector

Where

- Principal consultant at Synergy Professional Services
- Graduate faculty at Division of Management at Oregon Health and Science University

30 years of experience

- Advising management clients
- Managing complex technology development
- Developing new products

Specialties

- Strategy deployment
- Operational and project excellence
- Project portfolio management
- Organizational change management
- Facilitation

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You can enter text and up / down vote responses

What are some common barriers to full participation by everyone?

Top

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Example: short video clips increase participation



Teach or demo a concept, such as ADKAR



Southern Cross Business School

Tim Kloppenborg
Castellini Distinguished Professor of Management at Xavier University

Add a humor break



Engage participants' brains in a different way



Conversation, Personality, or Leadership styles are just *different layers* of a person.

To see from one style *limits and can mislead* a person from seeing what's really going on.

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Conditions for Full Participation

- 1. Understand topic and goals
- 2. Understand roles
- 3. Have confidence in facilitator
- 4. Feel safe expressing opinions ←
- 5. Free from undue influence ←
- 6. Helped plan for the session
- 7. Care about the topic ←
- 8. Believe that organization will support results
- 9. Have knowledge needed to make thoughtful contributions

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Real-time Poll

Which of these are most challenging for you to establish with participants in your meetings?

- A. Clarity about topic, goals, and roles
- B. Confidence and safety
- C. Buy-in to the process and results
- D. Knowledge and preparation to be able to contribute

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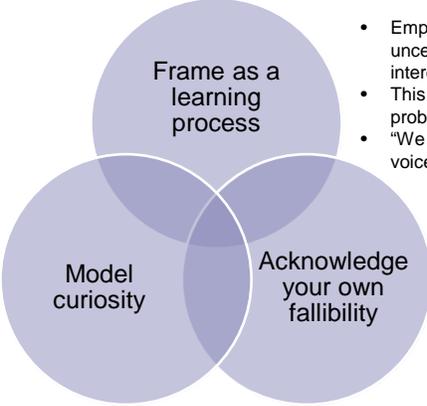


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Build Confidence: How Leaders Can Create Psychological Safety



Amy Edmondson, Novartis Professor of Leadership and Management at Harvard Business School and expert on teams
TedxHSGE, May 2014, 7:15 – 8:45
<https://youtu.be/LhoLuui9qX8?t=445>



- Emphasize that there is uncertainty and interdependence
- This is not an execution problem!
- “We need everyone’s voice in the game.”

Ask a lot of questions

“I may miss things I need to hear from you.”



Why is this relevant to group dynamics and increasing participation?

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Useful Technique to Increase Participation: Discussion Partners



We'll try this technique next



QuickTip handout is at www.spspro.com/pmi-2022

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Question for Discussion Partners

Here are some ideas for creating safety. Give examples of how some of these could work for you. What can you add to the list?

Ensure everyone is heard	<ol style="list-style-type: none">1. Ensure space for everyone's voice2. Encourage and model listening and empathy3. Thank people for their opinions4. Be approachable - encourage participants to come to you with their observations and concerns
Create a learning environment	<ol style="list-style-type: none">1. Model being OK with uncertainty and fallibility2. Frame the discussion as a learning exercise3. Reward questions, especially ones that are brave
Reduce negativity	<ol style="list-style-type: none">1. Guide the group to look for win-win situations2. Use safety norms3. During advance assessment, look for situations that may lead to attack, domination, or fear. Coach participants in advance as necessary
Encourage curiosity	<ol style="list-style-type: none">1. Ask "what if" and "why"2. Use open-ended questions3. Use ideation activities, such a brainstorming

Breakout Session: 7 minutes

ASSIGNMENT:

Zoom will send you to a breakout room on one of these ways to increase psychological safety.

1. Ensure everyone is heard
2. Create a learning environment where uncertainty and fallibility are OK
3. Reduce negativity
4. Encourage curiosity

You can access the list of ideas from your breakout room by going to www.spspro.com/pmi-2022

Have each person give an example of a technique (related to the topic of the room) that they've used to increase psychological safety.

After the breakouts end, I will call on a few groups to discuss. As a group, select your favorite example and be prepared to **give a short summary (about 1 minute)** if called upon.



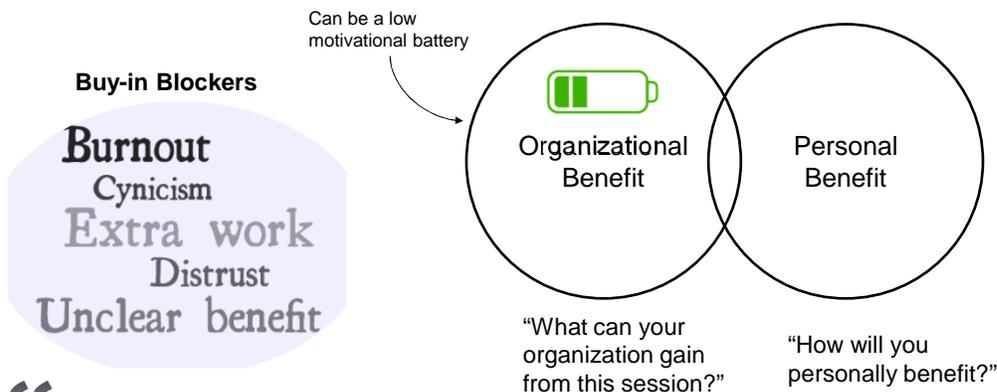
Use Safety Norms

1. Designed to reduce risk to participants of speaking out
2. Ask a question that will lead group to suggest appropriate norms
 - “What guidelines do we need for today’s discussion to ensure everyone can confidently share what they think?”
 - “Under what conditions are you able to speak freely?”
3. Most effective if suggested by group members, not facilitator (except in highly dysfunctional cases)

Examples of safety norms

- Everything said with positive intent
- All ideas listened to with respect
- What’s said here stays here
- No retaliation based on what’s said here
- No personal attacks
- Anyone can call a timeout if they detect stress, confusion, or going off track

Create Buy-in to Increase Participation



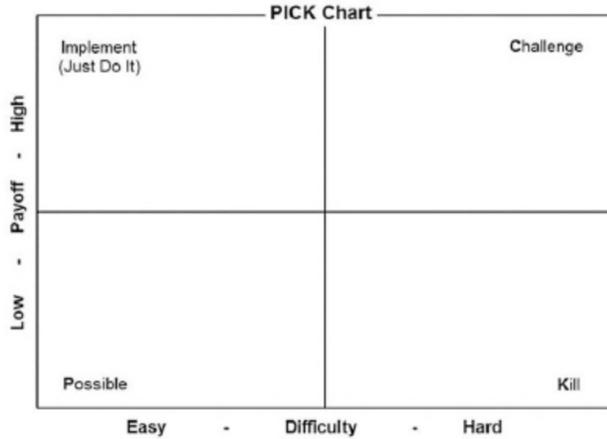
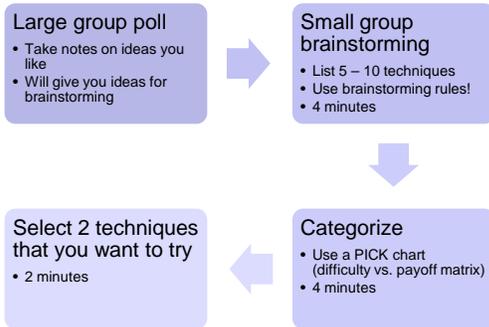
The responses to the second question amount to the participants’ psychological buy-in to the session ... When you [visually] record member responses to the two questions above, you’ll actually be recording group member participation.

- Ingrid Bens, *Facilitation at a Glance 4e*, p. 90



Activity: Collaborative PICK Chart

Goal: Select two techniques that keep energy and participation high.



QuickTip handout is at www.spspro.com/pmi-2022

Real-time Poll

What techniques do you use to increase energy and participation?



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Pay Attention to the Energy Level in the Room

- Breaking into small groups
- Sitting in clusters
- Interactive work such as brainstorming
- Humor
- Movement, such as marking up flip charts or placing stickies
- Being “talked at”
- Theatre style seating
- Physical distancing
- Large groups
- Domination of discussion by a few people

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Conclusion

We looked at several ways to increase participation

1. Ensure everyone is heard
2. Create a learning environment where uncertainty and fallibility are OK
3. Reduce negativity
4. Encourage curiosity

(Edmondson and Bens)

Now apply it

Individual - one minute

Pairs - one minute each

- Think of a situation where you must facilitate or lead a discussion
- Pick an idea for how you can increase participation
- Describe how you will try this idea

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Resources

What	Where
<ul style="list-style-type: none">• This presentation• Ideas for creating psychological safety• QuickTips on discussion partners and PICK charts	www.spspro.com/pmi-2022 (limited time)
My articles about projects, portfolios, strategic alignment, and decision-making	<ul style="list-style-type: none">• spspro.com/article-library/• spspro.com/blog
“Cat Herders” video	https://youtu.be/m_MaJDK3VNE
Psychological Safety video	https://youtu.be/LhoLuui9gX8?t=445
Wheel of Names	www.wheelofnames.com
Facilitation Techniques pocket reference	Bens, I. (2016) Facilitation at a Glance! Fourth Edition: Your Pocket Guide to Facilitation. Methuen, MA: GOAL/QPC.

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