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How to be a Chameleon: a Key to Enterprise Project Success

Joe Perzel, PMP



Thursday November 4, 2021

Compilation: <https://www.youtube.com/watch?v=vZ5mMJROidg>

Real: <https://www.youtube.com/watch?v=w9ecX8PRPSw>

Explanation: <https://www.youtube.com/watch?v=SQggDnScsvI>

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10/14/2021 6:07 PM © 2011

How to be a Chameleon

Agenda

- Background: Goals, Background, Assumptions
- The Required Skills
- Tips and Hints
- Barriers, Roadblocks and Concerns
- Situational Examples & Final Thoughts



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Administrivia

- Cell phones on stun or keep your audio muted
- If you need to standup, step out or walk around – please do so
- Questions and sharing are encouraged and rewarded
- We may “park” a topic/chat to help us stay on task
- More information in Addendum when you see an @
- Evaluations: please fill-out – all comments are welcome and appreciated
 - Content, Delivery, Examples/Exercises, Anything else
- Copies of PowerPoint are available - send email to joe@jperzelinc.com
- Look for the Golden Nuggets

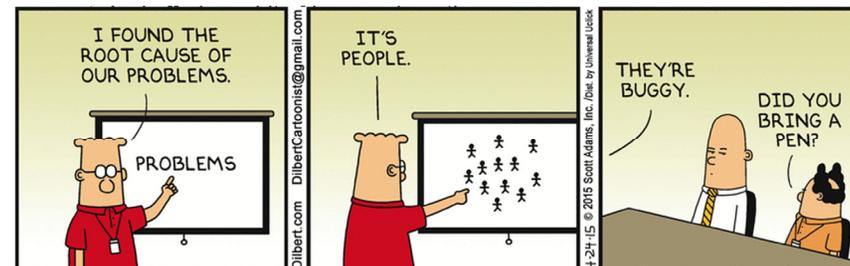


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Goal for today

- Make a case for why successful Project Professionals need to adapt to the other people in the sphere of their project, and offering tips and techniques on how to be successful
 - ✓ I will do that by:
 - Presenting content
 - Engaging you in a dialogue
 - Supporting my points with present-day, real-world examples



Dilbert.com - DilbertCartoonist@gmail.com

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Getting Started



- Who here is from IT, Operations, Business, Construction/Engineering?
- Anyone have project or staff manager experience?
- Who prefers to hear the main point first, then the supporting detail?
- Who prefers to hear the detail first then the main point in closing?
 - Which way is best?

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My Background

- Software development since 1979
- Business Analysis and Project Management since 1982
- Staff Management since 1983
- Program and Portfolio Management since 1989
- Worked on Business, IT/Technology, Operations projects
- Corporate, Not-for-profit, Government, Consulting & Staffing
- HealthCare, Government, K-12, Higher-Education, Financial, Agri-business, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance



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My Background

Some of the Larger, More Complex Projects

- The management of a 7 month project to create and roll out a family of business products for a healthcare company
- The development of a PMO office and corresponding policies, processes and artifacts for a Higher Ed organization
- The 18 month roll-out of Office 365 across the enterprise, including the redesign and rewrite of the corporate Intranet site
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business
- The 3 year custom development project to design and create a multi-state workers compensation system that would be available for future "sale"
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- The Planning, RFP creation, product selection, deployment/support of a 3 year ITIL and monitoring operations system for a company requiring 99.96% uptime
- The management of a 2 year rewrite of a custom Sales and Marketing automation system for a global reinsurance company

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My Background

Some of my presentations include:

- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- There are No Politics in Project Management
- How to Train your Dragon: a Project Sponsor Primer
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- Leading Strategic Initiatives: Managing Innovation Through Culture Change
- Managing Change and Surviving to Talk about it
- The Art of Selling and Salesmanship: Tools Everyone Needs to Utilize
- Situational Leadership: Up, Down and All-around
- A "Surefire" way to Ensure Schedule Performance!
- Managing Innovation in a Project Management World
- Joeisms: Leadership Concepts and Other Sage Words of Advice

✓ This should tell you a couple of things...

- I find titles market & attract attention which leads to project success
- I can be irreverent, sarcastic and love debates; so comments and other opinions are appreciated
- I focus on the soft skills in project management

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Assumptions

- Your interest is primarily to deliver the project specifications with all planned features, with a smile on everyone's face
- Not everyone has the same Agenda as you (or your PM or Sponsor)
- Everyone listens, communicates and processes information differently
- You can't change the way people listen, communicate, etc.
- You can't change the way people interpret someone, the situation, an issue - and how they act/react



Definitions

- **RAID:** Risk, Assumptions, Issues and Decisions
- **Triple Constraint:** Price/Pace/Perfection – cost/time/requirements or features
- **Slack time:** The built-in time in your project where you have excess capacity or duration
- **Crashing a Project Plan:** Optimizing the project tasks for quickest delivery
- **Dependency:** Required predecessor/successor
- **Table Stakes:** The minimum rigor required to handle the **mechanics** for a project
- **Resource:** Everyone (or thing) that assists you with your project
- **Wagile:** Doing a lot of short waterfalls and thinking it is agile
- **SME:** Subject Matter Expert
- **POC:** Proof of Concept
- **ROI:** Return on Investment
- **TLA:** Three Letter Acronym

Definitions

Chameleon:

- A distinctive and highly specialized lizard having the ability to change colors.
- However, it is a misconception that chameleons change colors to match their surroundings.



Adapt:

- to change (something) so that it functions better or is better suited for a purpose

Definitions

Influence:

- The power to change or affect someone or something : the power to cause changes without directly forcing them to happen
- Agent of influence an agent who uses his or her position to influence public opinion or decision making : is beneficial to the country

vs. Control:

- To direct the behavior of (a person or animal) : to cause (a person or animal) to do what you want : to have function of (something) : to way
- Undue influence, where one person takes advantage of a position of power over another person
- Control freak a person who attempts to dictate how everything around them is done



Definitions: Reality

Reality:

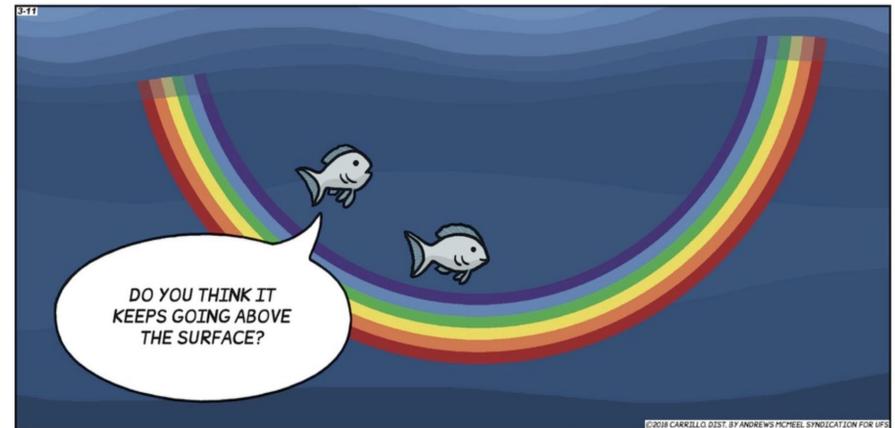
- The state of things as they actually exist, rather than as they may appear or might be imagined

Joe's Definition:

- The state of things that each individual believes actually exist
- Some Reasons why there might be alternative realities....
 - ✓ Different sets of information known/experiences by different people or groups
 - ✓ Different personality types
 - ✓ Different goals/desires
 - ✓ Different communication and/or learning skills

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Definitions: Reality



- Can't see the same thing

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Definitions

Joe's Definition of a Chameleon:

- Adapting to a situation to get the optimum result by using the best communication styles and motivators at your disposal to influence each person and/or group based upon their reality

- I call it "Playing to Win"



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How to be a Chameleon

Required Skills

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Required Skills

What being a Chameleon isn't:

- Changing yourself
- Forcing others to do your bidding
- Doing what you always do
- Covering up and/or avoiding the situation



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Required Skills

Know Your Organizational Type

- Your organization type, and your place in the organization, will determine many of the tools you have at your disposal

Example....

- Why do staff managers running projects within their department often have great project success?
 - ✓ Most, if not all, project resources work directly under their span of control
 - ✓ They have a history and certain level of respect going into the start of the project

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Required Skills

Know the people who can impact your project

- Know who they are likely to be?
- Personality Profiling
 - ✓ Be "Present"
 - ✓ Ask questions - and listen
 - ✓ Watch and observe visual cues
 - How they interact
 - Their office or cube
 - In different settings: formal vs. informal
 - In different settings: Individuals and in groups
 - In different situations: stressed or challenging
 - Their motivators

Hint: What is one of the biggest challenges to learning about the people you work with???

- ✓ Not enough face-time – i.e. working in different dept., remote, or by email, txt, IM

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How to be a Chameleon

What does DiSC stand for? What do the letters mean?



Dominance

Person places emphasis on accomplishing results, the bottom line, confidence

Behaviors

- Sees the big picture
- Can be blunt
- Accepts challenges
- Gets straight to the point



Influence

Person places emphasis on influencing or persuading others, openness, relationships

- Shows enthusiasm
- Is optimistic
- Likes to collaborate
- Dislikes being ignored



Steadiness

Person places emphasis on cooperation, sincerity, dependability

- Doesn't like to be rushed
- Calm manner & approach
- Supportive actions
- Humility



Conscientiousness

Person places emphasis on quality and accuracy, expertise, competency

- Enjoys independence
- Objective reasoning
- Wants the details
- Fears being wrong

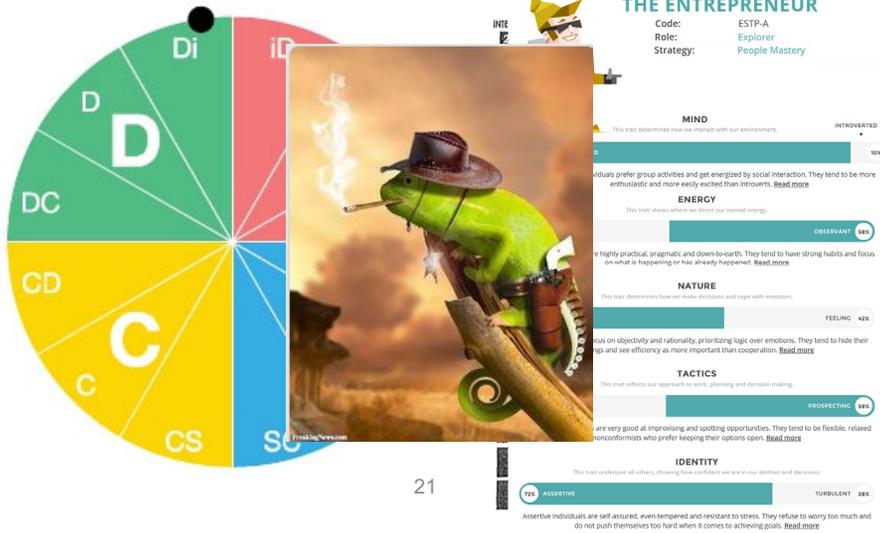
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Dominance - places emphasis on accomplishing results
Influence - Person places emphasis on influencing or persuading others
Steadiness - Person places emphasis on cooperation
Conscientiousness - Person places emphasis on quality and accuracy

My Profile



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Profiling in Action



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Required Skills

Know how to motivate people and groups

- Some of the typical Motivators
 - ✓ New technology/toys
 - ✓ Avoiding risk / Love risk
 - ✓ Recognition
 - ✓ Left alone & self-managed
 - ✓ Rewards :-)



- Make assumptions based on what you presently know about their role, communication style, age, tenure with the company, etc. – but be ready to change your position as you really get to know someone

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Required Skills

Know when to ask a question, and how to do it effectively, by asking yourself:

- ✓ Am I looking to gather information
- ✓ Am I trying to build rapport
- ✓ Am I looking to lead the discussion to a particular end-point or decision



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Required Skills

What is the setting

- Individual setting
 - ✓ Able to have a more candid conversation
 - ✓ People are less likely to posture like they might in front of a group
 - ✓ You can focus a particular style of communication to just the 1 person



Required Skills

What is the setting

- Group setting
 - ✓ Let the group know the type of meeting
 - Brain-storming – a collaboration
 - Interactive – Status reporting with Q&A
 - Information sharing – they are to listen and learn
 - ✓ A great way to apply group or peer pressure
 - ✓ A great way to utilize others to communicate or make your point
 - ✓ Set time parameters



Hint:

if you need to communicate in 1 style (i.e. detailed) make sure to warn the others, (i.e. less detail orientated) what you are doing

Required Skills

Assuring a good outcome

- When is it important
 - ✓ Soliciting a big decision
 - ✓ Have to have a tough conversation
 - ✓ Creating important documents like proposals or strategic plans
 - ✓ When it is leaving your personal control i.e. RFPs
- Validate or Practice before hand
 - ✓ Find the objections and issues before someone publically declares their opinion
 - ✓ Find your supporters and detractors
 - ✓ You have better influence over the outcome

Required Skills

Assuring a good outcome

- Options on how to handle
 - ✓ Review with a “safe” audience /cube mate - honest, available, relate
 - ✓ By yourself - put it in a “drawer”
 - ✓ Multiple cycles - back and forth

Hint:

- ✓ Involve others when you can
 - Ask for feedback on a “draft”
 - Ask others that have gone before you how they would handle it

Required Skills

Know how to handle an “issue”

- Key Elements
 - ✓ Are they open to receiving feedback
 - ✓ Do you know the best way to “share” your feedback
 - ✓ Where are each of you in the organization chart
 - ✓ What relationship have you previously built with them
 - ✓ What situation are you in when the opportunity presents itself

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How to be a Chameleon

“People may not remember exactly what you did, or what you said, but they will always remember how you made them feel”

➤ Carrie Bradshaw



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How to be a Chameleon

Tips and Hints

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Barriers, Roadblocks and Concerns

- When stuck ask yourself:
 - ✓ When it feels like “me or them” - think about how can I collaborate instead
 - ✓ When it feels like you are stuck - have a conversation
 - With the person or group involved
 - With a trusted “accomplice”
 - With someone “safe” to validate your stance or the other parties

Hint: How many folks are thinking – send an email or IM?

Preference should be:

1. Face-to-face in person
2. Face-face WebEx
3. Phone call
4. IM or text
5. Email
6. Avoid or ignore



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Barriers, Roadblocks and Concerns

- When avoiding or ignoring, ask yourself:
 - ✓ Are you emotionally drained - will a short break to recoup be ok
 - ✓ Are you scared because of past history - try a different approach
 - ✓ Are you afraid of what you might learn/hear/find out - it's not going to get any better
 - ✓ Is it too often your style (you being you) - time to change or get help with problem
 - ✓ Have you not taken the time to look, listen and be engaged enough to see what is going on - do the work



Barriers, Roadblocks and Concerns

- When you “Fear the Silence”
 - ✓ Remember, some people need time to think before replying
 - ✓ Silence can be a good thing - use it when necessary
 - Negotiations
 - Seeing what others are thinking before you commit
 - Letting other people step-up
- Not knowing yourself
 - ✓ Not a quick decision maker – allow some time to absorb or talk through or explain
 - ✓ Going into uncharted territory – take time to prepare or research
 - ✓ Tend to jump in too fast – take a breath or ask for a second opinion



Situational Examples

- ✓ Directing
- ✓ Listening
- ✓ Reacting
- ✓ Getting out of the way

Situational Examples

- ✓ Directing
- What: Someone or something is struggling and/or ineffective
- Need: Focused action
- Action: Assist with list of action items & plan for a follow-up

Hint:

- You must have actual, “perceived” or “earned” influence
- Different PM styles will do this in different ways



Situational Examples

✓ Listening

- What: Someone or some group doesn't know they need help
 1. They don't know what they don't know
 2. They are in uncharted territory
- Need: Empathize and Educate
- Action: Assist by observing and advising

Hint:

- Think peers, sponsors, executives

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Situational Examples

✓ Getting out of the way

- What: There is a problem or potential problem and the other party is updating you, but has it handled
- Need: Don't react without checking with them first
- Action: Silent support

Hint:

- This is not an excuse to disappear
- If someone on your team, smile they are well trained – reward them

“There goes my people. I must follow them, for I am their leader.”

Mahatma Gandhi or Ledru-Rollin

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Situational Examples

✓ Reacting

- What: Someone or some group comes to you to solve their problem
- Need: Understand the need & owner, then handle it
- Action: Use whatever means necessary

Hint:

- There are always multiple points of view for each situation
- Make sure the problem is something you should “own”
- When the project (or a resource) is struggling – it is your turn to shine



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Miscellaneous hints

- ✓ Always be thinking – what's in it for the other guy?
- ✓ Know what makes individuals and groups tick
- ✓ Be confident, but not egotistical
- ✓ Work to be trusted and respected



“You cannot build a reputation on what you are going to do...”

➤ Henry Ford

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SUMMARY

- ✓ If you want to be successful you need to adapt to others - they aren't going to adapt to you
- ✓ The bigger, more complex, important the project, problem, team the more you will have to continually adapt
- ✓ Understand strengths & weaknesses – yourself, every resource on your team & any resource that might help/hurt
- ✓ Anyone can influence someone that already respects and knows you well – the Chameleon is someone who can quickly adapt to another person's style and effectively communicate and motivate them
- ✓ Practice, practice, practice – continue to learn: people, how to adapt, when it is required
- ✓ Combine listening, rapport and motivation
- ✓ Remember to “ask a question”, and do it correctly

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QUESTIONS/ANSWERS & EVALUATIONS



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Email Joe to offer **feedback** or request a full copy of any presentation

The Dark Arts of Project Management Series

- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ Yes, And... Advanced Negotiations in a Project World
- ✓ The Art of Sales and Selling: Tools & Techniques Everyone Needs to Know
- ✓ Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- ✓ A “Surefire” way to Ensure Schedule Performance!
- ✓ Situational Leadership: Up, Down and All-around
- ✓ Leading Strategic Initiatives: Managing Innovation Through Culture Change
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World
- ✓ Selling the Value of the PMO and Project Management

Project Management Essentials

- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ Building your Essential PM Soft skills
- ✓ Using MS Project – the minimum you need to know to thrive
- ✓ Project Management for the Business Analyst

Case Studies

- ✓ Building out SCSU's PMO
- ✓ itSMF ITIL Deployment

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Project Management for the BA

Addendum

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Definitions

- **Project:** A temporary endeavor undertaken to create a unique product, service or result.
- **Project Sponsor:** a person or group who provides resources and support for the project, program, or portfolio who is accountable for enabling success
- **Triple Constraint:** Price/Pace/Perfection – cost/time/requirements-features
- **Downstream impact:** Relating to or happening at a later stage in a process
- **Committed:** Emotionally invested in the outcome
- **Disruptive Innovation:** causing a major change in a company and/or market place (think the first social media apps, creating the bridal registry)
- **Incremental Innovation:** causing a minor change in a company and/or market place (think converting bridal registry to all digital)
- **Innovation Disrupters:** The 20% of an Organization that causes change in the Organization - You!
- **Inductive vs. Deductive:** Bottom-up vs. Top-down

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Definitions

- **Resource:** Everyone (or thing) that assists you with your project
- **Stakeholder:** an individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project
- **Adapting:** To change (something) so that it functions better or is better suited for a purpose
- **Skunkworks:** a group given a high degree of autonomy and unhampered by bureaucracy, with the task of working on advanced or secret projects
- **RAID:** Risk, Assumptions, Issues and Decisions
- **POC:** Proof of Concept
- **SME:** Subject Matter Expert
- **ROI:** Return on Investment
- **CBA:** Cost Benefit Analysis
- **ABC:** Always be closing
- **QNC:** Qualify-Negotiate-Close
- **TLA:** Three Letter Acronym, something the world has too many of these days

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Definitions

- **Program Management:** the application of knowledge, skills, tools, & techniques to a group of related projects
- **Portfolio Management:** the centralized management of one or more portfolios to achieve strategic objectives
- **PMO:** a group within a business, agency or enterprise that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects
 - ✓ enterprise PMO
 - ✓ organizational (departmental) PMO
 - ✓ special purpose PMO
- **Waterfall:** a sequential (non-iterative) design process, used in software development processes, in which progress is seen as flowing steadily downwards through the phases of conception, initiation, analysis, design, construction, testing, production/implementation and maintenance
- **Phase/Activity/Task:** Various levels of a schedule/plan

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Definitions

- **Agile Scrum:** iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a development team works as a unit to reach a common goal", and enables teams to self-organize by encouraging close online collaboration of all team members.
- **Agile Kanban:** method for managing knowledge work which balances demands for work with the available capacity for new work. Work items are visualized to give participants a view of progress and process, from task definition to customer delivery. Team members "pull" work as capacity permits, rather than work being "pushed" into the process when requested.
- **Epic:** a large user story in software development and product management.
- **User Story:** informal, natural language description of one or more features of a software system. User stories are often written from the perspective of an end user or user of a system.

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Definitions

- **Scrum Master:** resource who is accountable for removing impediments to the ability of the team to deliver the product goals and deliverables. The Scrum Master acts as a buffer between the team and any distracting influences. The Scrum Master helps to facilitate key sessions, and encourages the team to improve
- **Stand-up:** a short, focused, timely meeting where all team members disseminate information – often held daily
- **Story points:** effort level assigned to the work to complete a Story
- **T-shirt sizing:** ballpark estimating of the size of effort to accomplish something
- **Empathy:** the feeling that you understand and share another person's emotions; the ability to share someone else's feelings
- **Process:** A systematic series of actions directed to some end
- **Slack time:** the built-in time in your project where you have excess capacity or duration
- **Crashing a Project Plan:** optimizing the project tasks for quickest delivery
- **Dependency:** required predecessor/successor



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Definitions

There are a lot of people with a PM title or responsibility in this world – it is one of the most difficult jobs to consistently and accurately articulate

Joe's Definitions of the Multiple Types of Project Managers:

- Project Coordinator: great at mechanics of the project
- Technical Project Lead: focuses on managing the technical team
- Application Project Manager: handles projects under \$500k and 10 people
- Enterprise Project Manager: handles projects over \$1M and 20 people



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Dominance - places emphasis on accomplishing results

Influence - Person places emphasis on influencing or persuading others

Steadiness - Person places emphasis on cooperation

Conscientiousness - Person places emphasis on quality and accuracy

Personality Profiling - the various types:

<ul style="list-style-type: none"> ✓ Are good at delivering on repeatable tasks ✓ Don't like risks or change ✓ Tend to get along with everyone ✓ Stable & predictable ✓ Loyal & Good listener 	<ul style="list-style-type: none"> ✓ Like positive motivating environment ✓ Enthusiastic and optimistic ✓ Will fill the air when there is silence ✓ Want to get along with everyone ✓ Like large groups ✓ Wants to make a good 1st impression
<ul style="list-style-type: none"> ✓ Want immediate results ✓ Are fast at making a decision ✓ Like challenges & will take a risk ✓ Direct and to the point ✓ Will take charge when they see (perceive) a leadership vacuum ✓ Problem solvers 	<ul style="list-style-type: none"> ✓ Wants to know more - is analytical ✓ Follows the rules ✓ Likes subtle or indirect approach to conflict ✓ Need time to absorb a point before offering an opinion ✓ Systematic



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Required Skills

- Who here has done a personality profile?
 - ✓ (D) Controlling / Happy to follow-along
 - ✓ (I) Extravert: large groups / Introvert: smaller groups
 - ✓ (S) Process & Repeatable oriented / Unique challenges
 - ✓ (C) Detail Oriented / Big Picture



Websites for various personality profile tools:

<https://www.discprofile.com/what-is-disc/overview/>

<https://www.discinsights.com/personality-style-d#.Vr0HqFLGrcM>

<https://www.gallupstrengthscenter.com>

<http://www.16personalities.com/>

<http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/>



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How to be a Chameleon

Email Etiquette

- EMAILS, IM and Text are for:
 - ✓ Confirming and clarifying
 - ✓ Introductions
 - ✓ Quick transferring of information that doesn't require negotiations
 - ✓ Good News
- EMAILS, IM and Text are **NOT** for:
 - ✓ Communicating bad News
 - ✓ Negotiations or disagreement resolution or arguing or venting
 - ✓ Topics that need discussion (If a topic requires more than 3 email/Test/IM messages, pick up the phone)
 - ✓ Any communication that requires analysis of the receiver's reaction
 - ✓ Multi-faceted/threaded conversations
 - ✓ Fast Action

Two Ways to Communicate

Inductive Presentation

evidence
↳ point
evidence
↳ point
evidence
↳ point
sum all points
↳ Big Point

Deductive Presentation

Big Point
- sum all points
Point
- evidence
Point
- evidence
Point
- evidence
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