# Leadership, Projects, Learning

## Guest was Lou Russell

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## Transcription of the Podcast

**Joe:** *Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Lou Russell. She is the CEO/Queen of Russell Martin Associates, an executive consultant, speaker and author whose passion is to create growth in companies by guiding the growth of their people. She inspires improvement in leadership and project management with learning and training as the central hub of it all. I have been inspired for many years by her work, not even knowing who Lou Russell was, and that she was only down the street, in the same state. Welcome, Lou – excited that you are participating.*

**Lou:** Thank you so much, Joe. Thank you for inviting me. This is a wonderful honor.

**Joe:** *I only have a few of your seven books, but – what is the connection you have between leadership, project management and learning? That's what they're all centered on.*

**Lou:** That's a great question. We talk about that being the three legs of our stool. What happens is – when a customer call us, normally they have – kind of like when you go to a car place, you try to diagnose it yourself so you don't get ripped off – so usually when our customers call, they say, "Oh, we have a leadership problem," or "We have a team

problem," or "We have a training problem," and they have tried to, sort of, triage it themselves. Usually, what happens is – they have all three. They have a project management problem, a leadership problem, and usually some team dynamic problem. So, yeah, that's why we do it that way, because they, usually, need all three of them.

**Joe:**      *One of the books – and I think it's your first one – was the Accelerated Learning Fieldbook. Which has a lot of great exercises in it. Is that how you first got into the writing and the learning portion of it? Was it true, Accelerated Learning?*

**Lou:**      It is. That's really interesting. That's an oldie, but goodie and I rarely get to talk about that book anymore. That was my first book. It was a very painful experience when the first – I was actually approached by Jossey-Bass to write it, based on some speaking I was doing around and about. My first draft came back, and it was primarily red ink. Well, you think you're a writer until you write a book and they remind you that no, actually, you're not.

I learned a lot about writing in that book. In those days, it was a pretty long book, you know – now, I think that book was over 300 pages – oh, I mean a lot of exercises like you said, and techniques and stuff, but now, you know, when I start a book, they're like, "OK, no more than 200 pages, because nobody can read that much anymore," so that's kind of funny too. My personal vision statement is – I ignite, affirm and sustain learning in self and others.

My purpose is to help people learn; help myself learn. Accelerated Learning was just – especially the multiple intelligence stuff, by Howard Gardner – it's so powerful and so important. Obviously, we all learn differently, and we need to honor our own learning styles – and completely off the radar right now. I mean, everything that we build, whether it be websites or e-learning, we are completely ignoring that right now, and it's kind of depressing, but it will come back.

**Joe:** *The book was interesting. It was over 300 pages, plus, you had a CD with it, if I remember correctly.*

**Lou:** Yes. That's an interesting question, too. Marty Morrow, who was, at the time, an IT leader at Lilly – worked at some different places, and now he's retired. He actually composed the music for me, and there's two pieces in there – one is music to read by, and one is music to do, kind of like, exercises by, or to do case studies, or to be more active. It's really nice music, except – at that time, my children, actually, my youngest are turning twenty today, I have twins that are turning twenty today – happy birthday – they were babies at that time, or maybe two years old or something, you know, they weren't very old, and we could put that CD in and they would go right to sleep, so it was perfect for that as well.

**Joe:** *Your philosophy – if I understand it correctly – reminds me a little bit of TWI, or Training within Industry, which is a "Lean" thing, and a lot of listeners know what I'm talking about here. First we have to show someone how to do something, and then they learn by doing, and then the pupil becomes a teacher. Is there a connection to your work*

*there – I get the "accelerated learning" part, then the "project management" and, all at once, there's a "leadership" component, and those steps seem very similar.*

**Lou:**    Yeah, exactly. I'm stating the obvious, so I apologize for that in advance, but we like to say, "Lecture as a last resort," because that's not how people learn. There's absolutely no evidence. It's kind of like multi-tasking is impossible, but even though the evidence exists, nobody cares.

It's the same thing – you don't learn by listening to someone else, we just don't. We always say,  "Lecture as a last resort," and that goes through all our products, whether they're a newsletter – we try to make even our newsletters interactive – or whatever we're doing, we're trying to make it a conversation versus a lecture. How else are you going to learn project management without working on a project? That's ridiculous.

When people come to our classes, they are bringing a project with them, of their very own, so they leave with real work done – they're working on real stuff – and then, in our leadership class, we assess them, you're working on your real stuff, your real team, you real politics, all this stuff that we do lives in the real world, not in the academic world. You know, that really matters, and I think that ties right back to the "accelerated learning" stuff.

**Joe:**    *I have never read any of your leadership books, yet, but you're saying that training and learning is a central part of that also?*

**Lou:**      First of all, I don't believe in training, so that's another thing, but – because training is one-way, right, "I'm telling you", it requires an expert, and no one is an expert nowadays. We all have plenty of things we can learn as you and I know all too well. So, we talk about facilitating learning, and even in that field we're talking more about how has my performance changed – in other words, what am I able to do after I invest time in this learning event that I couldn't do before. That's our metric. If you can define project management, that doesn't sound very useful – who cares? If you can show someone a charter of your project, that's incredibly powerful.

With the leadership thing, it's – we use a series of profiles called trimetrics. So, people come out with a model of their teams they work in. They see the blind spots of their team. They see the strength they bring to the team. You know, they have this whole immediate thing they can apply, to right away implementing and creating more performance in their team. That's the deal – kind of, hit the ground running.

*Joe:*      *Well, how do you – you've put on webinars – how do you make a webinar interactive?*

**Lou:**      Oh, I dare you to go watch some of those. The best examples of those, which are potentially not the most "learning", but the best examples of those – once a year, we have a party, a webinar party. We either have a holiday party. We had a New Year's party. We had a Halloween party. I think this year, we may have had a 4th of July party. We do all kinds of crazy interactive stuff, and all our webinars are recorded and free out there so you can find them – usually in Training Magazine Network – and on our website and stuff.

It's really easy, you just have to decide that you're going to do it. You let yourself be limited by tools, no matter what the tools are. You can make good e-learning, or you can make bad e-learning. One of the interesting things, I think, about e-learning is – this will sound crazy – but one of the things that really supports the multiple intelligence is, you can ask somebody a question in e-learning, and they can type in the answer, and you don't have to correct it. Just the process of them answering is enough for learning to occur. You could ask open-ended, leading questions, and get them to process a little bit through the questions, but we tend to be, tell-test-oriented in e-learning, so that kind of stinks.

**Joe:**     *It surprised me, because when I look at your project management books, I think, OK, here's a structured project management book, you're supposed to do this and do this – and they're not that way, but...*

**Lou:**     Hey, there's templates. There's a little structure.

**Joe:**     *... there's a little structure. Tell me a little about your project management books, and how that space is created?*

**Lou:**     Blasphemous. I think the correct word is "blasphemous". Let me do the disclaimer – we are PMI education providers, so we are completely and fully aligned to the project management body of knowledge – OK, there we go, that's done – but it's too much. I used to teach IT project management when dinosaurs roamed up 69, but mostly for IT people, and we kind of got in this space of teaching project management in the last five years to

people who never meant to be project managers, and they don't know what happened. Like, how did they end up being project managers, and everyone is doing projects now, because we're all multi-tasking so much.

That's kind of interesting – we describe projects nowadays as flash-mobs. The flash-mob people come together through some kind of virtual communication for a very specific purpose. They arrive, they converge in, they do a thing, and then they fade out divergent to the crowd. This is exactly how we're running projects in large companies and all companies right now. You converge for a one-hour meeting, you pick up and you go to your next one-hour meeting. It's very frustrating, and nobody is getting anything done. What if we step back from that and say, "Hey, if we were creating a project management process, Lean, let's say, for flash-mobs what it would look like. I like that metaphor to help, now we're talking about simplifying minimal. We have been in that space – that's worked out really well for us. "Bad news early is good news," is one of our mantras. You seek to communicate, because that's the only thing that will save you. Don't seek to control or you're dead. There's no control. There's no ego, or your project is dead.

Last week, I was speaking at Project World in Seattle, and I was doing a project scheduling lab – and people were supposed to be bringing in their project and normal stuff – and all of a sudden, in come these eight people, and they're all from Boeing, and they're all PMPs, and they're all in IT, and they're all building some innovative aircraft, you know what I mean? I said, "Here's what we're going to do – I'm going to sit down and you're going to teach me scheduling." I was completely intimidated, I was like – you guys are you kidding me – and they go, "No. We need to hear this. We need to simplify."

We have new traction in IT of all places, where the most complex is complex, and nothing is getting done. So, there's interest there. The other big push in project management right now is – how do we train executives to sponsor well? What an excellent question that is. Right?

**Joe:**     *I just say it's going to be done that way. Come back and look at it, right?*

**Lou:**     We're abandoning that captain Picard model that you just spoke of, right? "Make it so." No, we're not doing that anymore. We have probably three of four opportunities right now to help with executive sponsorship, which is really interesting.

**Joe:**     *How does Agile fit into this? I start seeing Agile floating into your vocabulary online there.*

**Lou:**     Yeah, I'm very careful with that. Let me give you a little history – I have an expired IT degree from Purdue in computer science, and my first gig after I started my own business was to get affiliated – one of my first was to become a consultant for Cutter Consortium in Massachusetts, and I also did a little work McDonald Douglas, and that's where I met Jim Highsmith who was one of the Agile manifesto dudes. I met a lot of those people because I was doing consulting work with them, and I feel like I was standing very close to them when they invented Agile. It was such an organic movement, and – this is so simple – and I understood their philosophy.

Now flash-forward – it ebbed and flowed – depending on who you ask, and in some places in IT, they go, "Yeah, we do that all the time," and then you go, "Yeah, maybe," right? It still has some huge challenges in corporate America, even on the big project side, because skill ability is still a question – how do we manage that? The other thing is, corporate budgeting isn't really set up. Fortune 1000 budgeting is not really set up to keep thinking up features as long as you want, you know. It just doesn't line up well. So, there are those challenges, for sure, and that tension will probably remain. Interestingly enough, one of the folks from Boeing said they're doing something called iterative waterfall – I love that – and what they said was, you could google it, it's a thing.

**Joe:**     *It is a thing.*

**Lou:**     I was like, "OK." So, what is it? They said, "Well, what we found is – if we're building a new airplane – just doing features is not good. It's too big. We need to have the bones first. We need to lay out a sketch of how many rooms or whatever. We need something." Sounds suspiciously like a project charter to me, but even more functional bones, you know, just like – what are the pieces? Then we can let these Scrums take off, and all this Agile stuff happen, and these sprints, and then they can all fit in and we're still – not keeping control – keeping track of the interactions of all these pieces, and I thought that was really powerful. That was interesting. That was a couple of weeks ago.

Flash-forward, I'm primarily – right now, I do a lot of work with people that are HR training people. We have a really great relationship with ASTD, which is now called ATD, and e-learning guild and Training Magazine – we do a lot of work with all those folks on project

management. One of the things that have been interesting there is – I'm watching this industry go through what IT went through in the '80s, exactly the same. So now, there's a new methodology in that field called SAM, which is RAD, basically. It's called Successive Approximation Method, and they start to say, "Well, it's Agile." Well, it's not Agile because you're not – first of all, you're not on lockdown with the people – and second of all, you're not doing dumb things, you're doing iterative prototyping.

It's very orchestrated iterative prototyping, but to me, it's iterative prototyping still – that's different. I'm amazed at how many people are saying Agile, which is why I guess I said I'm careful with this – Agile requires the customer to be involved, at least a few, right – a lot, involved a lot. Maybe locked up like you're building the Macintosh. It also involves creating dumb things, a small piece of dumbness, as I say. I'm not seeing it. Those two rules are – I went up to a vendor at one of the show that did this presentation on how they develop all their e-learning with Agile, and I said, "How do you capture the customers long enough?" and they go, "We don't use customers." Oh, interesting. Then Agile is pretty easy for you. You can build whatever you want.

***Joe:*** *I get myself in trouble with a few communities I participate in, because they'll be doing this customer-journey mapping, they'll be doing value-stream mapping, they'll be doing all these different mappings and showing how a customer is going to react, but I look around and there's no customers in the room. I said these are just hypotheses. How can you do this without bringing customers in?*

**Lou:**     Unless it's something new. Allen Interactions is a phenomenal e-learning company, probably one of the best in the industry. They're the ones who came up with the SAM methodology, which is a very structured RAD – you'll be interested just because of your background – that they have a savvy start iteration, which is a bit different, and then a design iteration, and then a build iteration. Those are all three swings-through. Three prototypes go, three prototypes go. Then alpha-beta gap at the end. Well, where did they got the three prototypes from – was the Mythical Man-Month, because Fred Brooks said, you know, the first one is faulty because you didn't get it all in there. The second one is over the top – you put too much other crap in there, and the third one is the best, and after that, you have no benefit to going again. You're not going to get the cost of it – it's not going to bring you the value you expect.

I just love that this new methodology goes back to the Mythical Man-Month that was published first in 1979 or something. Yes, so now I'm old. It's really interesting – the reason that methodology is structured that way is because they do consulting work, right? They develop e-learning for people. They can't get the people all the time, so this is their shot at trying to get the people involved, and then pulling out do some work, and then getting them involved again. I get that. I mean, it's again like I'm saying – if you have flash-mobs, you can't have everyone with you all the time. We can't even be with ourselves all the time anymore. It's just not possible right now.

**Joe:**     *Does you new book cover this, or is this even later than your new book?*

**Lou:**     The Managing Projects book – I think it was probably a little bit before. We're going to – I'm in rewrite right now with the Project Management for Trainers book for ASTD, and the Agile and SAM, and ADDIE versions – ADDIE is the waterfall in training. It's so funny, everyone thinks they invented that, you know, whatever industry you're in – "Oh, yeah. We have Waterfall." Yeah, so does everyone else. Apparently, that's what God used to build the planet in the first place. It's going to be in the rewrite of that, but the big difference with Managing Projects is – in the middle of that book, is a lot on influencing skills.

I have gotten the same question three times, and one of my facilitators just called and had the same exact question from people. This is the craziest question, but so proves to you what's out there. So, these are accidental project managers and they say to me – actually, one of them was an IT project manager – "How can I make people deliver what they're supposed to when I tell them to?" Like, give me the software that does that. I just sit there and go, "I don't even have an answer for this." Because you influence people. "What? What is this "influence people?" you know what I mean.

**Lou:**     What was funny – but I was legit. I was talking to a CIO friend of mine the other day, Ron Winter at the Track, and I said – so I'm thinking, I take the Crucial Conversations book and I flowchart it, and that's my answer. You know, there isn't a tool for everything. We still have to talk to people, and sometimes they won't do what we want, even more so now.

**Joe:**    *I find that so true – that people ask when they talk about project management – one of the first question out is, "What software do you use?" and it's like, I don't care. Whatever you want to use, OK? Whether it's Gant Chart, whether it's anything, there's a time and place for all of them – whatever is easiest for you to understand and get something done. What do you want to use?*

**Lou:**    In learning, again going back to Accelerated Learning, the thing there is, until you do it with play, kind of, with post-its, you're not going to be able to use software anyway, it's going to completely confound you. One of the other things I think is just mystifying to me is that everybody, when left to their own devices, will skip project charter, skip it completely, and just do a schedule, because we have software for that. But we really don't have the software for project charters – I guess we have templates, but it's not cool enough – it doesn't have, like, software. So, that means it mustn't matter. The project charter defines why you're spending money on this project instead of something else. It gives you the whole reason for being of the project, and you skip it and build a schedule that's supposed to actually be right? How can it be right? You don't even know what you're doing. That makes me crazy. That's one of my little blasphemous pet-peeves, sorry.

**Joe:**    *I think you hit a very good point, because when you read any project management book, they're just like, let's get to it. We're sitting here talking about scope, and charter and let's just get to it.*

**Lou:**    Let's go. Let's build stuff. Yeah.

**Joe:** That's the feeling you get. What I like about your Project Manager for Trainers, OK – I mean, I love that book, because it's very much, "Do it!" You know, here's a charter, but do it.

**Lou:** Given that you've had the proper conversations, so let's put that on the table – given that you've managed to capture long enough to get the need – basically, the project charter should take less than 45 minutes – it's a draft. It's always a draft. There's no way you can build a final project charter before you've started the project. You don't know what's going on. It's going to evolve. It's an organic, evolving thing, as is the plan, and if neither of those are evolving – I know someone right now is having cardiac arrest about this – "You're supposed to control a project!" No, you can't. It doesn't belong to you. It belongs to the business. Anyway, if it isn't changing, then no one needs that project – you should be cancelling it right now.

**Joe:** What is your Focused Performance Bundle?

**Lou:** Oh, that's interesting. So, we have a class that we have been teaching the folks, called Focused Performance, and it basically helps them – leads them through some exercises to create strategic goals, and then prioritize those strategies, and then break it down into projects, and then a process for putting the tasks on their calendar. It's about two-thirds of a day class that leads them through translating vision and strategy into action. The profiles are part of that as well. What we decided to is – we thought it would be cool to try to bundle that and offer to people to teach themselves. Go through it with their teams. They could either do it just themselves or the team could, kind of, imagine you're

going to take a Coursera course together. It's not set up like that specifically, but just to have a format, and it has some interactive PDFs – so you have tools, so you feel comfortable.

It's very interesting to me, people in general don't know how to break things down. That's another thing – work breakdown structures – everyone is always talking about work breakdown structures in project management. Unless you're in IT, they make sense to you. Everybody else in the world thinks left-to-right – this happens, then this happens, then this happens – and we were losing them in work breakdown structures, sort of like, you don't have to do these if you don't want to. Just put post-its all over the wall, I'm good.

**Joe:** I think people struggle with that, don't they? I know what you're saying – if you put it all over the wall. I see these IT things created and all these post-it notes, and then they actually, "Oh, no. Use this color." Then we have different colors meaning different things, and it's like, "OK. Well, that's pretty cool."

**Lou:** I'm not a big fan of red-yellow-green either, to tell you the truth. People spend so much time arguing about colors – it's ridiculous. The secret to too many tasks is milestones. Milestones are amazing. Milestones help you glob things together so that you can get to your seven plus or minus two, or whatever, and understand things. You're kind of leading me into the course material, really. "Why do you need milestones?" Because look at all those post-its – I can keep track of them.

**Joe:**     *What is ahead for Russell Martin Associates? What's your focus? What's your vision for your company?*

**Lou:**     That's a great question. Right now – we have had the goal for, I don't know, a couple years now to be scalable and sustainable. We've had a rough time through the recession, of course, like everyone – eked through. We are growing right now, and we are working on making sure we have a base to support that growth. We have some partners in different countries that are doing some work, but we're going to stick to the same playground. It's going to be the same three legs of the stool.

Trying to figure out – I do believe, and this is maybe sad or not sad, but I do believe that instructor-led training is not going to grow. It isn't growing now. It's going to get flat. There's going to be places for it – I really think if you can do instructor-led leadership training, that's best, because you want the people physically together – but you don't necessarily need to do instructor-led project management training because we're doing it online also, and it works just as well. It's a cheat a little bit, because you push the homework off to them. So, that's a little bit of a cheat. We're still going to try to innovate around – are there cool ways that learning can occur through virtual means, and can we get learning to more people – but we're not going to adopt the technology because it's a technology – that's the scary part.

**Joe:**     *Is there anything immediately upcoming for you, as far as speaking or anything?*

**Lou:**　　Well, yeah. I'm everywhere, actually. I will be in Indiana – I will be at the CIASTD gathering, which is in a couple of weeks at, I think it's at Rolls-Royce, I'm not positive. Ciastd.org. I'm going to be in – next week, I'm going to be in Winston-Salem, speaking. The end of this week, I'm in Minnesota. Then, the end of the following week, I'm in Cedar Rapids, I believe and then in Boston area. So, I'm all over the place.

Just get on the website. You'll find us. We have our quarterly free webinar coming up in November through Training Magazine Network, and it's going to be on project management lying, so that should be a good one.

*Joe:*　　*What's the best way for someone to contact you?*

**Lou:**　　It think the best way would probably just – go to our website, RussellMartin.com – two Ss, two Ls, M-A-R-T-I-N dot com. You can also just e-mail us at info@russellmartin.com. So, anything you heard – if you want to find out about the webinar or anything – there are people waiting to hear from you right now.

*Joe:*　　*OK. That sounds exciting. I appreciate it. I think your information top of the line, and I appreciate the conversation very much, Lou.*

**Lou:**　　Joe, let me add one more thing – we didn't really talk about it, but the 10 Steps to Successful Project Management book – which is sort of in the middle – is the best for a starter. So, the 10 Steps to Successful Project Management, it's the best starter book. It's relatively inexpensive. It's probably going to be $15, $16 on Amazon. It also has templates

that you can download – there's a link in it. It has the story of the three pigs trying to get their projects done – very acute. Also, corporate pigs, actually. So, people might want to start there.
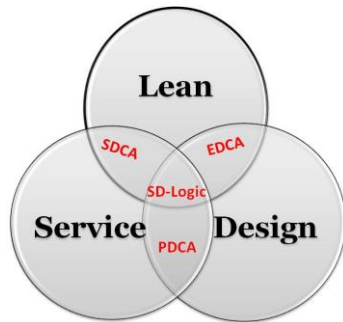
**Joe:**     *This podcast will be available on the Business901 iTunes store and Business901 Blogsite. So, thanks everyone.*

# Business901    *Podcast Transcription*

## *Implementing Lean Marketing Systems*

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