Paper PM08

Leading through talents

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ABSTRACT

The part of the project lead role that I enjoy the most is recognizing the talents in the team, often faster than the talent owners themselves. I have created a mentoring program, giving people the exposure and variety of the tasks that they needed to glow. The outcome has been amazing; my mental load as a project lead has dropped significantly whereas people have gained a safe environment where they could experiment and learn without putting the quality and timing of the deliveries at risk. I find this approach towards managing a team energizing. I would like to share my story and inspire team leaders to look at the new joiners way broader than through their years of working experience. In my presentation I will go through specific examples and recommendations for developing talent-focused management style.

INTRODUCTION

"If your actions inspire others to dream more, learn more, do more, and become more, you are a leader."
John Quincy Adams

I have witnessed so many times that strong technically people are promoted to the leadership roles based on their years of experience or because someone quit and a role became available, with an assumption that they will be able to figure out the skills needed in the leadership role themselves and that there is no additional training needed. They take up this role thinking that they will be able to show how skillful they are and that they will finally have the freedom to organize how they want. However, the role of the leader is no longer about getting the work done yourself – instead, you manage workload that requires engagement of a team. You quickly discover that people lack some of the skills that you have. Sometimes they lack motivation or they question your leadership. Sometimes they are lost about what is expected from them and are too stressed to ask. Therefore, this new role, being a project lead, quickly forces you to redefine how you understand your success. The focus changes from doing the work to training people while managing the variety of requests from multiple sources, handling the budgets, timelines, building new relationships with all people having impact on your team and advocating for anything that the team needs to be successful. This is an intense, overwhelming change. It is tempting to withdraw to doing part of the technical tasks again, to feel knowledgeable and in control at least for a moment. However, the team needs you doing your job to succeed, and you need them to do theirs. Today I want to tell you how I went through it using talent-focused team management.

In this article I will elaborate a bit about what kind of skills are needed to progress from a technical role to a project lead role successfully. I will show how people can prepare for this step way ahead of the promotion, both from the perspective of a manager preparing someone to own parts of the project, as well as from the perspective of a talented and ambitious employee who wants to learn more. I will present some examples of mentoring contracts, and I will talk about how they changed the landscape in the projects that I was leading. I will talk about commonly made assumptions that block this proactive learning, and some systems and habits that support it. I will touch on topics like change management, succession planning, neurodiversity, work-life balance, talent management, career development, building the team, generation gap and work shadowing.

What I am presenting is not exactly an 'accelerate your career' idea. Think about it more like about an access to a library of knowledge. Not everyone will be interested to learn more, and you should not force it. Those that will be interested may learn about themselves, the branch, the processes, tools used, soft skills needed. Maybe they will use it in a way that will indeed make their career proceed faster – but this is not what the program is meant for. I never had the power to make a promise of a fast promotion to anyone. The concept is teaching people through my own transparency, by involving them and through letting them experiment and learn. The idea is to delegate various tasks so that the project lead can focus on tasks that no one else can do and that they can be proactive in defining their own tasks. The idea is also not to wait for promotion or for project lead absence to give the team broader exposure. Instead, as early as possible we give the team safe space to explore, and we give the leader safe space to challenge them, to the benefit of both.

MY STORY

I became a programming project lead when an existing project lead left the company, so it was not a change that I have initiated. In my early days projects were relatively small, my English seemed enough, so I dealt with things alone, asking my manager for advice as needed. With bigger projects the situation changed. The duration of them exposed me to staff turnover and I needed to keep training junior employees. Email traffic became unbearable. I was having more and more meetings, and I was starting to feel it's impossible to ever focus on my own work.

I needed to change my approach. I started noticing that some people are doing some things really well and they were interested in helping but shy to offer it. At the moment when I started receiving really good questions from some of the most junior colleagues, I knew what to do. I wanted to engage them to take responsibility for pieces of the project. It was a bit of a rebellious act – in some cases it meant that I allowed people with few months of experience in the branch to work independently, make decision and interact with the broader team directly. I could not risk executing the project, so we got the process properly planned in the form of a written contract.

Recently I started leading a project again after few years break, this time with a very mature and experienced team, and I am rediscovering some of these learnings. I believe many people can use these considerations – those who dream to become leaders, those who are new in this role, and those that are experienced and exposed to never ending changes of the landscape in which they work.

THE SAFE ENVIRONMENT FORMALISED - CONTRACTS

The majority of the team that I worked with did not have long experience in the clinical trials, therefore they were afraid to act independently. To encourage them, I have drafted written contracts that specified what we could be trying to achieve, for how long and how. This was thoroughly discussed with them to take into account their existing knowledge and experience, interests, priorities and fears. The contract contained a promise of weekly meetings, and the mentored colleagues were encouraged to ask any question they may have. We were also proactively discussing what else could be useful for them; developing a habit of catching opportunities for the desired exposure.

The contract assumed that from the beginning they would be learning by working on real project tasks. After 3-4 weekly meetings, we would meet to pick the objectives for the next month based on the learnings, interests and how things have worked so far. The contract may end with permanent delegation of some tasks, or with writing a new, much more ambitious contract if both sides think there is still unfulfilled potential.

Below I will present few contracts made up for the needs of this article that show the concept in more details.

EXAMPLE CONTRACT - ROBIN

Let's assume that I have a colleague named Robin who likes to investigate the data a bit while doing their regular work. They have discovered that one endpoint from the CRF did not make it to the SDTMs after a subsequent rerun – they have also identified the underlying issue in the specification. They also had an idea to check if the data of subjects confirmed the protocol-expected diagnosis. They were not very experienced so they still struggled to link the data with the analysis plan or to find the right endpoint in the CRF or in the database. After they approached me few times with really good questions about data processing, I have suggested planning some learning for them.

Here is the example contract, with some notes on how things turned out.

Contract between: Robin (ADaM/ TFLs programmer) and Karolina
Duration: 3 months
The objective of this contract is to learn the process of data processing that happens prior to ADaM creation.
How this will be achieved:

MONTH 1

- Robin will review with the SDTM issues tracker and we will discuss their questions/ findings.
- We will have 30 mins call where Karolina will explain:
    - the aCRF creation,
    - raw data process and structure,
    - how standard mappings are managed,
    - the types of external data used in the trial.
- If an issue needs to be added to the data issues tracker, it can be delegated to Robin. Karolina will review it to confirm that correct language was used.

MONTH 2

- Robin will be invited to the SDTM-related calls. If there is no tracker, they will try to take minutes.
- Robin will be introduced to the people who program SDTMs or manage SDTM-related standards.
- Robin will review the tracker or the meeting minutes from previous call before the meeting to check if any updates from the programming side are needed. Karolina will help with any communication or investigation if Robin asks. Karolina will attend the calls and lead the discussion, however Robin knows that they can freely speak if they have something to add.

- Robin will review the P21e findings for SDTMs.
- Robin will attend as a silent listener the CQM-related calls and delivery outputs review calls to see how the broader team investigates data.

MONTH 3

Now, this is where a deeper conversation is needed, as this can go into multiple directions, depending on Robin's interests and current project needs. This is also a good moment to pick a task that Robin could own and devote a month to build their confidence in it.

Examples that we considered:

- Robin could take over attendance in any meetings related to SDTM, or
- Robin could draft a code that will allow us to check the data quality quickly
    - It may be part of CQM process (so – in interaction with the medical team),
    - It may be to check the key or the most problematic endpoints every time we get new data transfer (this would require introduction to the statistician),
    - It may be to check new type of endpoints (e.g. first central data transfers, which might require introduction to the external data providers),
- Robin could work on the patient dossiers (outputs of the CRF-collected data delivered to the central reviewers to support their review), or
- When the CRF needs update, Robin may be the best person to review the suggested changes from the perspective of the programming impact, or
- Robin may also familiarize themselves with P21 reports for SDTM and ADaM,
- Robin could program some key endpoints based on raw data to ensure all the data is mapped.

Robin's researching skills and well as interest in how processes work together give a great foundation for any task where deep understanding of the data is needed. They may become the employee to quickly identify the core reasons of any unexpected scenario seen in the data which will be a great help to the whole team.

In the end Robin took over tasks related to SDTM programming and developed a relationship with the client that let me stop attending these calls. Robin handled the emails and meetings by default, people were directing questions on this topic to them (with me in CC), and it was Robin's responsibility to ask for help if needed.

EXAMPLE CONTRACT - ASH

Imagine I have a colleague named Ash. Ash sends me short emails after our conversations summarizing agreements and tasks. They are very organized, they come to meetings with a ready list of questions. They sometimes take initiative to help clear misunderstanding between the programmers during the team calls and I can see that it is important for them to make everyone feel included and valued in the conversation. Ash felt very upset after witnessing one conflict between colleagues in the team and it suppressed their enthusiasm to engage more. Ash has also attended a random call with a client in the past and was terrified to realize they were not able to follow the conversation. I valued the way they worked a lot as I could see that they calmed people down – by careful listening and noticing everyone and well by their problem-solving focus and their organization. I was curious how this approach would work in client interactions.

After few conversations, Ash agreed to look closely at things that overwhelmed them together with me and to check if they can develop skills to manage these situations in ways that would not leave them feeling stressed and helpless.

Contract between: Ash (ADaM/ TFLs programmer) and Karolina
Duration: 3 months
The objective of this contract is to learn how to lead team meetings.

MONTH 1

Ash will be the minute taker in the regular weekly programming team calls. They can also start preparing agendas for them. Initially I will be leading the conversations and Ash would only be making notes of what was covered and agreed. After the calls we will discuss any behavior that they would not know how to handle: what to say if you do not know an answer to a question asked, how to ask for repeating or clarifications, how to redirect the topic. We will practice rephrasing unclear statements to confirm the understanding and, sometimes, to earn time to think what to say. We will practice introducing a new thought, agreeing or disagreeing with the previous thoughts.

We will also look at handling colleagues who are upset in the calls and challenge things, and at handling any interpersonal conflict. We will analyze what happened after the upset colleagues spoke up and what could happen to the quality of the delivery or to the relationships in the team if instead they stayed silent. We will look at the intention behind the conflict and also will try to notice any situation when conflict brought resolution or improvement of the situation.

I was indicating to Ash any instances when there was an agreement reached to discuss a topic offline, via email or a separate call, as an acceptable way to handle any unexpected scenario.

I have shared my calendar with Ash and have created a public folder for the trial so that they have access to all the project emails.

MONTH 2

Ash can start controlling time in the weekly team calls – that would involve the opening and closing of the meeting, executing the agenda by asking people to give updates on their areas of expertise, and then summarizing actions. Ash would also be learning to recognize when the discussion needs to be interrupted and wrapped up and we would discuss how this was done in the calls that we attended together. We will analyze whether time management in the meetings, even though sometimes unpleasant on the spot, is overall supportive for the team or not. We will discuss the importance of leaving some time for the questions or “any other business” from the team, or simply of allowing people to have a few minutes of a break between one call and another.

Ash can attend regular meetings with a broader team where the structure is less repetitive and make attempts on drafting the agenda for it. That would require thinking about which topics should be prioritized (sequence and time allocation), and whether any additional person (e.g. expert) should be invited.

Ash can also be a person to note down actions while the meeting is ongoing and summarize them in the end.

MONTH 3

Depending on Ash’s interest at this stage, they could develop further into more administrative or more interpersonal direction.

To develop interpersonal skills Ash could attend some calls where conflict or negotiations are expected to learn the vocabulary and style of having such conversations. They could also be CCed in the respective emails and draft the responses to help the project lead.

Alternatively, Ash could focus on calmer tasks like gathering requirements and preparing the specifications for the new requests. They could attend the meetings where clarifications of the algorithms are needed. They could own any process where regular calls are needed, or where client has requirements for a very detailed documentation.

Based on social interests, Ash could also engage in building the team communication skills by helping people ask the right questions and use rephrasing to communicate more efficiently. They could be the team to-go person for drafting difficult emails.

Ash could also engage in organizing networking activities and initiatives of the team – ranging from knowledge share sessions to social outings, or in organizing some trainings or workshops for the team.

During these three months, Ash kept an eye on whether no one was skipped in emails and calls and they did forward some emails and invites to people who were missed on their own initiative. They have also questioned my decision-making process, where I sometimes discussed with the experts and made decisions that were only communicated to the team, thinking that this way I will save some time. Instead, I started communicating more in the weekly calls and it let us avoid some rework as impact across all processes was considered before implementation of a change. I was very proud of them when they approached me with this suggestion.

EXAMPLE CONTRACT – ARYA

Imagine a colleague named Arya. They come from a more technical background and ask many questions about why the processes were implemented using some set of tools instead of the others. They write small macros to automate various processes and introduce them to the team. They would be interested to verify if any of the tools that we are using daily can be amended or optimized. I was not able to answer their technical questions.

I discuss Arya’s questions with my manager and we create an initial list of colleagues that they could network with. During a call with one of these colleagues we learn that there are some programmers involved in this kind of projects within the company and that one of them is senior and acts as a point of contact between the programmers and the company management. Arya attends some of their calls to find out more details and is accepted to spend some percentage of their time working with this group on tools that can then be used in the projects.

After few weeks of splitting work Arya requested a 121 meeting and informed me that while they enjoy the technical aspects of this side project a lot, they are completely overwhelmed with managing working in two places. We agreed that we will spend one or two months checking if the situation can be improved before taking a decision to withdraw Arya from this project. We have drafted a contract.

MONTH 1

I got engaged in tracking the hours worked in both places, I have also asked to be involved in the emails about the tasks assigned.

It turned out that the side project team was sending requests that created pressure to add few hours of extra work at the expense of regular project work. As a result, Arya was feeling stressed when working with any of the teams. The requests were not phrased strongly, they were more like ideas shared, however the behavior was repetitive. We have decided to look closely at how Arya's availability is communicated. We have written an email where we explained that Arya will work on the side project every day till noon, and then they will focus on clinical project together with the rest of the team.

MONTH 2

In the second month Arya realized that they are not happy with the initial idea for organizing work. Every day they needed to switch a project at some stage, and it was a time- and energy-consuming process. Moreover, very often they needed to draw a boundary to avoid extending the agreed hours for the side project. We decided to try another approach, where Arya would devote Fridays to the side project and on the other days would focus on the clinical project. In closer conversation it turned out that Arya was really shy to communicate that they needed to go; instead, they were hoping that coworkers will remember their schedule and manage their own expectations. Arya was afraid that if they spoke up, the team members would be disappointed and see them as not engaged. We worked through the resistance to communicate the availability clearly, indicating that it results in their stress and tense working relationships. We have realized that the clinical project team was also not clearly informed about Arya's working schedule – they just had information that it might happen that Arya will not be available.

We have agreed that Arya will draft the needed emails and then it will also be discussed in a call where I would join them. In the first call it turned out that the side project team was not aware of Arya's stress levels, and they agreed to limit the requests to Fridays.

The clinical team flagged a concern that on some weeks when we deal with a delivery it might be problematic to free Arya for the whole Friday, as it might impact work of a big group of people. It was agreed that on such weeks Arya may try to reschedule or cancel the side project availability, and that Arya will not engage in very time-critical tasks in the clinical project. We have used this opportunity to also show to the team what tools Arya hopes to develop for us.

Arya added the working schedule into their email footnote and agreed to mention it in calls with the teams as a friendly reminder.

MONTH 3

Arya was finally able to feel that they are happy with how their work is split. During this month Arya handled the communication about their availability themselves, with me in CC. We went through a clinical project delivery successfully, where Arya skipped one Friday of working on a side project. Arya used our weekly mentoring calls to draft emails about the future leave plans and how they wanted to reschedule the side project work to avoid skipping another week.

In the end of the contract duration, we agreed that I will stay in CC for emails regarding allocating tasks for one more month and then Arya will be assessing themselves if they need my help.

Few months later the tools created by Arya's team were presented to the whole company.

SEEING DIFFERENCES IN THE TEAM AS A CHANCE

Trying to catch opportunities to use people's talents changed my perception of the team. I have realized that people differ a lot in what they can do and with what effort – and that is amazing news as this way a variety of tasks is covered. Someone was doing research and drafting emails that I could send further without any changes. Someone else was writing clear and complete documentation and asked all the needed questions on the way. Someone was able to program an ad-hoc request within one afternoon, or update a complicated macro without disrupting the existing functionalities. Someone did not mind repetitive tasks or explaining easy things to others. Some people seemed more engaged when the task seemed difficult, others preferred repetitions. Some people were able to see problems weeks before they hit us, while others were quickly enthusiastic to new ideas and suggested multiple ways to implement. Some people had skills to arrange the information graphically in a very clear way.

At this stage I would risk stating that if you struggle working with someone – probably you can learn something from them, because they for sure do things differently than you and most likely have different strengths than you. It is worth listening to their ideas on how to get things done, and why this way, what are their priorities and how they define their success. I would even be tempted to suggest - share with them where you get stuck and see what they would suggest for it; it might be the right way forward.

I have realized that listening first brings a lot of value, and that sometimes going through conflict of opinions is what brings the best solution to the surface. The added value was that I realized that I do not have to (and should not) make all the decisions myself, I also do not need to try to have an answer to every question. What I needed was involving the team, with all the variety that they were bringing, to work on challenges together, while I do things like clarifying the requirements, negotiating more time or networking to get everything that the team needed – the lead tasks. Instead of feeling guilty that I do not do things myself, I have started letting people take credit for the tasks they handled, praising them loudly and openly.

OBSTACLES ON THE WAY

If you try to implement this approach, you might face some pushback. One reason is that if we train people, their promotion and salary expectations might increase. For this aspect, very clear communication is needed at the stage of signing a mentoring contract – promotion or salary increase is not part of it. This initiative does not come from the top, from management. It is more about exploring how much freedom we have to organize work within our team.

Another thing that I was hearing is that these people are not experienced enough to perform the tasks that I assign to them or to interact with more senior colleagues. However, with the right support and stepwise approach, they were performing well. I did collect feedback on their performance, I also checked whatever they asked for and sometimes did some spot checks myself. Mistakes happened, it is inevitable – some of them were made by juniors indeed, others were made by me or experienced programmers. We learned and grew by owning them and resolving them together.

Some very technical people were not interested in the program and it was perfectly fine – although some of these skills will also be needed in the technical path of career, and the networking bit would be useful too. As I said earlier – this kind of differences are valuable, as these people will probably bring great technical strengths and focus. The example of Arya shows that sometimes even the strongest technically people can still need help to get organized – I was waiting for them to identify a need rather than forcing them to participate.

The mentored colleagues pushed back sometimes too, when the steep learning curve did feel challenging. There were periods when I helped more so that they could recharge a bit. They were listened to carefully, and I invested a lot of time and energy in recognizing their effort, skills, engagement and development. However, it never happened that someone withdrew from the mentoring program before it was completed.

SYSTEMS THAT CAN HELP

What can help to get started?

- If the company has a functioning feedback system that involves commenting on the strengths (e.g. KEEP/ START/ STOP), people will get a better idea of where they are strong and that can boost their engagement and confidence.
- If the company promotes development and encourages asking questions and analyzing mistakes without finger-pointing, that’s a great learning foundation. It is actually a needed skill to know how to handle a mistake at work according to the procedures and taking care of the relationships in the team – it is good if people can witness this before they need to be the one to apologize. I was always particularly loud about my mistakes, and I was making sure that people can witness how I identify, communicate and fix them. This way those that were in the learning process, exposed to increased responsibility and new type of tasks, knew that they were expected to communicate and fix their mistakes rather than hide them.
- The company can develop some email handling trainings for tasks like in the examples below:
    - Setting up a public folder to which project emails are copied (preferably, automatically). It has a great advantage that someone using this folder will get exposure to what kind of email traffic they might be dealing with as project leads.
    - If the above is not possible, setup a rule that auto-forwards e.g. every email with “SDTM” in the title to Robin’s inbox.

    - There can be rules created based on whether your name is in 'To' field or in 'CC' field, which can be used for filtering of emails to be handled by different people.
    - People can be tagged in emails.
- Working transparently as a team. Being loud about who is learning what, and who is good in what. Making people teach each other. After few months my team members knew who specializes in what and were supporting each other in their areas without involving me.
- Holding regular meetings where people are allowed to share ideas and brainstorm. Listen to them and try to use their ideas.

HOW THE PROGRAM IMPACTED MY WORK

As you can expect, as a result of introducing the project I have delegated many tasks. After few months I had an independent lead for some domains, and I stopped checking their emails before they were sent because I had full confidence that they were not worse than what I could write. I had a team member who was able to research topics that were so complicated that I was not able to specify a clear task – all I had was "I'm not sure if this is reported out correctly, please check". I have delegated the whole SDTM bit of my project and a separate team was created. I had a group of junior colleagues carefully following detailed instruction written by one colleague who valued clarity in their tasks.

The team achieving things faster and with more confidence was not the only benefit. If the lead handles all the non-programming tasks themselves, for every delivery they will stay alone to do the documentation while the team logs off. With this mentoring scheme, some of the team members will be interested to see how the actual delivery looks like. Maybe they will want to watch the datasets/ outputs upload. Maybe they will draft the delivery email or run the last checks of completeness of the documentation. This approach reduces loneliness and stress levels in both the mentor and the mentee. The mentee is doing these things for the first time with close oversight, and the mentor can also use a fresh eye and someone who will check if everything is in place when closing out a delivery.

Another aspect that I was seeing was a heart-warming boost of self-confidence and engagement in the team.

There were also many small things, like people initiating a call from a meeting room and inviting me to join rather than calling in separately. Sometimes after a long meeting I was discovering that the team has received and addressed a request or a question from a broader team and there is nothing left to do for me. Sometimes people could attend a meeting instead of me if I had other urgent work. Periods of sick leave or annual leave became less stressful to me.

WHAT TO DO IF NOBODY APPROACHES YOU TO BE YOUR MENTOR

Not every company will have proactive leaders who will approach anyone to mentor them. However, you can try to organize your learning yourself. Ask questions about the processes followed in various situations, about the role of various people in the team. Offer help to more experienced colleagues in the areas that you find interesting. Every role contains some simpler or repetitive tasks that could be delegated, so you might proactively try to make yourself helpful to increase your exposure. If a task requires organizing a meeting to discuss the approach, ask to be included in it. If there is an email exchange, ask if you can be CCed. Offer drafting the email or meeting minutes. Ask about things like data download/ upload processes, who is the decision maker for what kind of topics, how are various things documented, which procedures are applied, and try to find a place where you can help. Sometimes you might be able to suggest a process improvement – you might have some niche or new knowledge from your university, you might be able to simplify a task that was updated many times and it's not done efficiently now. You can offer that you will write documentation of some non-standard process. You can offer that you will validate or automate something that was done manually so far.

CONCLUSION

In this article I have presented the non-hierarchical and inclusive approach to the team leadership. The assumption behind this approach is that the core task of the project lead is no longer doing the same work that the team is doing, even if they have skills for that – instead, they should have focus on developing the skills and spirit of the team and creating the optimal environment for their success. By using the talents and interests of the existing team members, as well as the differences in their personalities, the lead can organize work in a way that they can delegate some of their tasks with a benefit to the task performer and without posing the risk to the project deliverables. The prerequisites to such team functioning are – encouraging people to learn and ask questions, supporting those who admit to errors and learn from it, involving the team members in shaping their tasks and workload, together with clear communication of what is expected from them. For junior colleagues, clear expectations mean starting with small steps with clear guidance to build confidence, then trying things on their own with close oversight, ending with owning some tasks that they can organize as per their preferences and initiating tasks that they consider needed. Experienced colleagues can start from intermediate steps of this process.

In the introduction I have mentioned that this presentation will touch on the topics like neurodiversity or the generation gap. Some of the neurodivergent colleagues have preferences about the kind of tasks they engage in. Examples could be that an autistic person may have a preference for quiet tasks with limited interactions, and may find it easier to communicate in writing – which will make them a great documentation author, or a great person to write a complex algorithm. People with ADHD (attention deficit hyperactivity disorder) might have ability to stay deeply focused for a long period of time over a task that they find exciting – their resilience might be hard to beat. Depending on the generation the employee comes from, and sometimes also on their culture of origin, the interest and patience levels for small talk or long group discussions may differ. Some employees will organize their work brilliantly to always end at 4 pm. Others will prefer to have plenty of freedom about the working hours – but will also be able to offer the availability outside of the typical office hours if needed. The approach that I am suggesting involves the employee to actually say how they want to work and how they define their success. The leader can guide them about their strengths but in the end, the decisions about the tasks are made together. This approach engages the team and brings joy and excitement to daily work, and on the other hand - reduces the mental load and loneliness of the leader, which is the desired win-win.

The views and opinions expressed in this presentation and the accompanying paper are those of the Author only.

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