Delivering Bad News

22 February 2024

Mark Mullaly, Phd, PMP

Interthink Consulting Incorporated
mark.mullaly@interthink.ca
@markmullaly

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Webinar Objectives

- Understanding The Challenge Of Bad News And Why Delivering It Is So Uncomfortable

- Differentiating What We Mean By "Bad News" (And Recognizing That Not All Bad News Is Alike)

- Identifying Strategies For Delivering Bad News Well
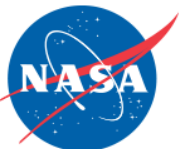
NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

2

Defining Our Terms

"Bad News"

Defining 'News'

- 'News' Means:
- A report of recent events
- Previously unknown information
- Something having a specified influence or effect
- Material reported in a newspaper or news periodical or on a newscast
- Matter that is newsworthy

- Source: merriam-webster.com
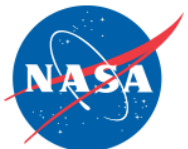- Definition taken on 16 May 2022

Defining 'Bad'

- 'Bad' Means:
  - Failing to reach an acceptable standard
  - Morally objectionable
  - Inadequate or unsuited to a purpose
  - Disagreeable, unpleasant
  - Injurious, harmful
  - Incorrect, faulty
  - Suffering pain or distress
  - Sorrowful, sorry
  - Invalid, void

- Source: merriam-webster.com
  - Definition taken on 16 May 2022

NASA_APPEL NASAappel

APPEL | KNOWLEDGE SERVICES

Defining 'Bad News'

- 'Bad News' Means:
  - News of unpleasant, unfortunate or sad events
  - An irritating, troublesome or harmful person, situation or thing

- Source: wiktionary.org
  - Definition taken on 16 May 2022

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

What Does The PMBOK Have To Say?

- More Than I Expected
  - The term "bad news" does appear, although exactly once (in a discussion of ethics)
    - Integrity is comprised of ethical behavior and honesty.
    - Individuals demonstrate honesty by surfacing risks, communicating their assumptions and basis of estimates, delivering bad news early, ensuring status reports provide an accurate depiction of the project's status, and in many other ways.
  - The term "honest" appears six times
  - "Difficult" appears fifteen times
    - This is less about message, and more about the underlying complexity and ambiguity of a problem

- Source: PMBOK Guide, Seventh Edition

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

There Is An Inherent Personal Challenge In Delivering Bad News

- We Want To Be Liked
  - We dislike and can avoid situations where people are angry or upset with us

- We Want To Appear In Control
  - Bad news can create the perception that we are not on top of the situation

- We Want To Appear Competent
  - We can resist circumstances that call our skills and abilities into question

- We Don't Want To Be Yelled At
  - We fear the potential response to being the bearer of bad news

NASA   X NASA_APPEL   f NASAappel   aPPEL | KNOWLEDGE SERVICES

We Hope We Can Fix It

- Problems Start Off Slowly
    - Problems rarely, if ever, appear at the eleventh hour
    - We frequently (although not always) see them coming
    - The hope is that we can head them off and resolve them before they have an impact
    - The tendency is to downplay the significance and severity while we try
    - Eventually, we become entrapped in a narrative of our own making

- This Is How Status Reports Lurch In Status From "Green" To "Red"
    - This should be a progressive transition
    - It is often conceding that we no longer have the ability to fix the problem

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

We Aren't Sure Yet What The Answer Is

- Knowing That A Problem Exists Is One Thing
  - It is another thing altogether to know what the solution should be

- We Can Defer Addressing A Problem While We Seek Solutions
  - Working to better understand how the problem originated
  - Figuring out what we can do about it

- This Tendency Is Often Reinforced In Organizations
  - "Don't bring me problems, bring me solutions" is a common—and championed—refrain
  - The challenge is how to respond where there are not clear or obvious solutions
  - This is most likely to be true on the problems that are big, messy and consequential

NASA   X NASA_APPEL   f NASAappel   aPPEL | KNOWLEDGE SERVICES

Not All Bad News Is Created Equally
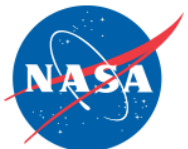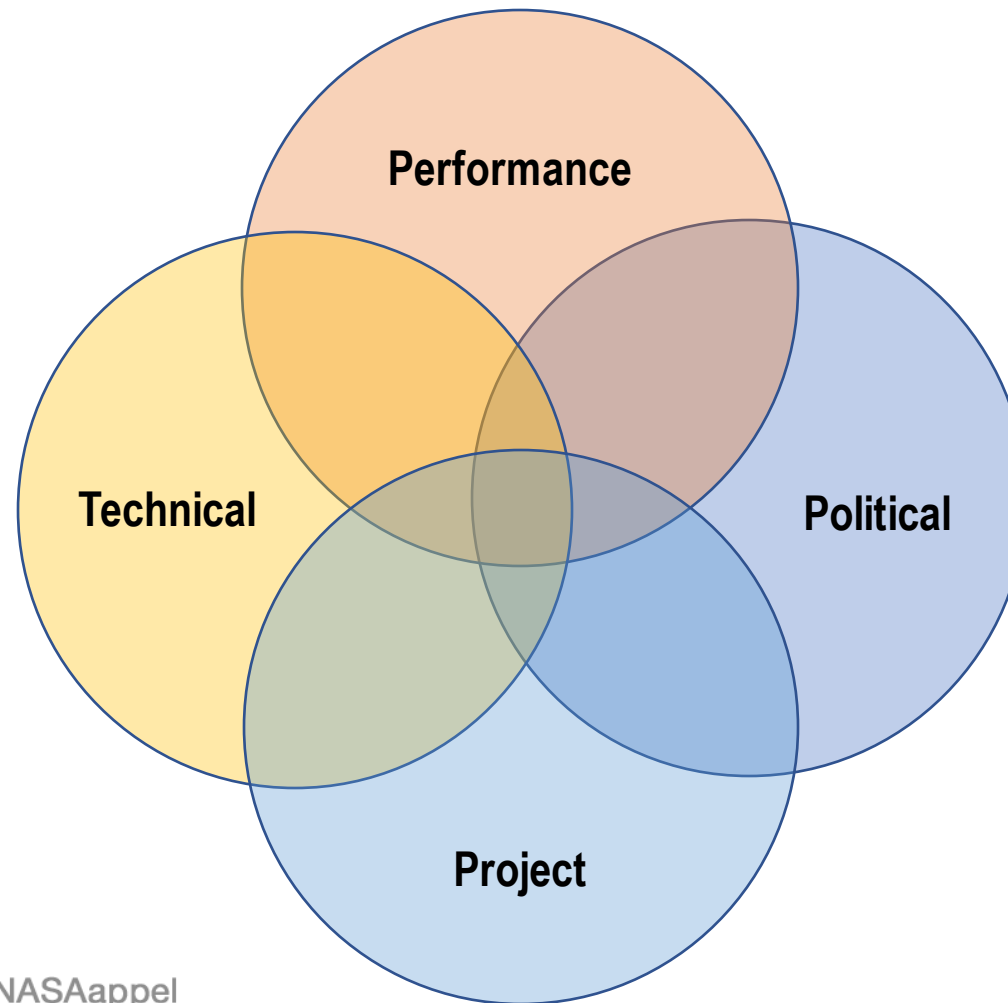
NASA_APPEL   NASAappel

APPEL | KNOWLEDGE
SERVICES

The Scope Of Bad News

Problems Of Performance

- If We Are Honest, This Is Where Bad News Usually Starts

- This Is Not Necessarily Actual Problems Of Performance
  - It can certainly be the perception of problems with performance

- Actual Issues Can Emerge In Any Context
  - Individuals
  - Teams
  - Vendors
  - Stakeholders

- The Challenge For Project Managers Is Being Able To Constructively Address Them

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Problems Of Technical Issues

- Technical Problems WILL Occur
  - This is not a question of "if"
  - It is a question of "when"

- Again, This Can Take A Variety Of Circumstances
  - Content
  - Design
  - Process
  - Data
  - Software
  - Infrastructure

- This Is Largely A Product Of "It's Not Working The Way We Expected It To"
  - The challenge is determining how to resolve the situation
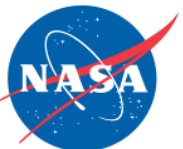
NASA_APPEL   NASAappel

Problems Of Political Issues

- Political Problems Are Also Largely Inevitable
  - They emerge as expectations shift and evolve

- How They Emerge Will Vary
  - Stakeholder expectations will change
  - Different groups will disagree with each other
  - New and previously undiscussed expectations will emerge

- This Is A Normal Product Of Organizational Behavior
  - Views and perspectives are not necessarily stable, and will evolve over time
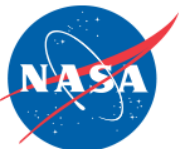
NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Problems Of Project

- These Are The Problems We Are Most Directly Taught To Address
  - Although in many instances, they are a product of other problem types

- Project Problems Are Most Often A Product Of Misaligned Expectations
  - The objectives and outcome are not clear
  - Estimates of cost, schedule and resource are unrealistic
  - Scope is not clearly articulated or appropriately delineated
  - Success is not sufficiently well defined

- The Theoretical Solution Is More Rigorous Project Management
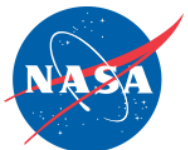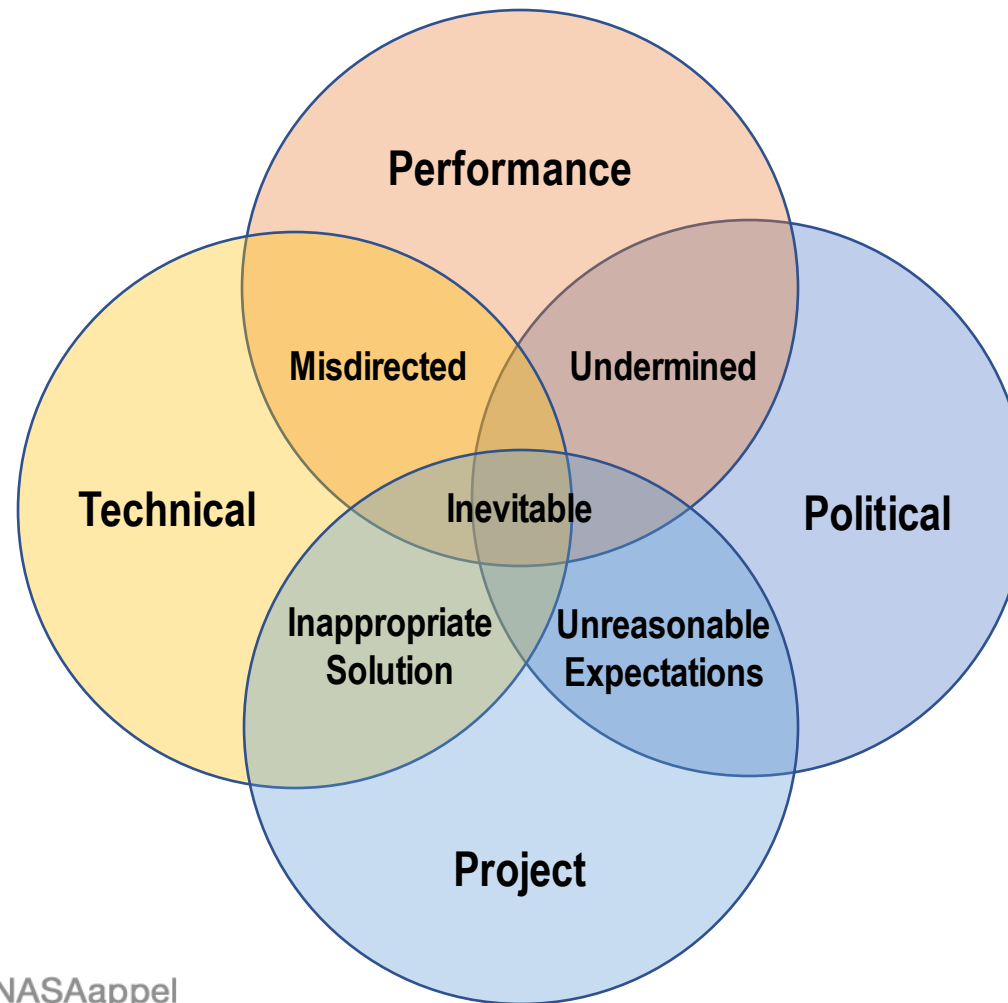 - The reality depends upon how these challenges intersect

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

The Scope Of Bad News

Problems With Our Performance

- Sometimes, The Problems Lie Closer To Home
  - Specifically, they are to do with what we have (or haven't) done

- Why This Occurs Can Vary
  - We are exceeding our capacity
  - We have been assigned projects that are beyond our capabilities
  - There is a misalignment in terms of expectations
  - What we are being asked to do doesn't fit what we like or are good at

- These Can Lead To Particular Instances Of Defensiveness
  - We recognize that we are—at least in part—at fault
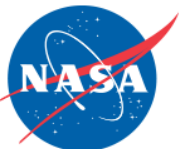 - We don't want to acknowledge or directly concede the point

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

Problems With Our Sponsor's Performance

- While Also Close To Home, This Is An Entirely Different Kettle Of Fish
    - Largely related to attentiveness, competence and commitment of our sponsor

- We Are Trained That This Should Not Occur
    - That we should look to our sponsors for leadership and guidance

- The Reality Is That It Occurs All Too Often
    - Our sponsor are frequently looking to us for guidance and insight on how to proceed

- The Most Significant Challenge Is Being Honest About This Reality
    - Identifying the problems, and inspiring a shift in behavior and involvement

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Good Ways To Deliver Bad News

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

Understand Your Environment

- Delivering Bad News Well Means Knowing Your Audience
  - You need to understand what they care about
  - You need to think about how they will react
  - You need to tailor your approach to ensure that the message you intend is received in the manner that you intend it

- What Shapes Audience Expectations Is Context
  - The culture of your organization will shape you participants hear you
  - Culture reflects "this is how things are done here"
 - Ignoring this is rarely wise, productive or career-enhancing

NASA_APPEL   NASAappel   aPPEL | KNOWLEDGE SERVICES

Bureaucratic Organizations

- The World Is Still Rife With Bureaucratic Organizations

- What They Value And Reinforce Is Important To Understand
    - Rules matter
    - Conformance matters
    - Respect for hierarchy and structure matters
    - Compliance and adherence is expected
        - Even where practices might be inappropriate or not fully adequate to address the problem

- Bureaucracies Are Where Initiative Is Least Rewarded
    - There is a tendency towards a safe and cautious approach
    - Defined by a reluctance to take ownership, avoidance of problems and deflection of blame
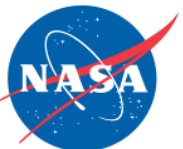
NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES
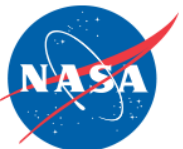
Performance-Oriented Organizations

- Performance-Oriented Organizations Seem Like An Antidote

- They Value Getting Things Done
  - Outcomes matter
  - Competence matters
  - The perception of best practices matter
  - There is a strong reliance on routines that have proven successful in the past

- This Can Be Where Problems Are Most Likely To Be Reinforced
  - Overconfidence and over-valuing of perceived competence
  - Less likely to question, and the most likely to minimize or dismiss problems

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Learning-Oriented Organizations

- Learning Organizations Emphasize Understanding And Evolving

- They Value Paying Attention And Learning From Experience
  - Lessons matter
  - Continued growth and insight matters
  - There is continued investment in continuous improvement

- These Are The Organizations Most Likely To Accept—And Praise—Identifying Problems
  - Express appreciation for identifying the problem
  - Constructively approach and meaningfully evaluate what is happening
  - Productively address the problem now, and further reflect how to change later

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

The Kind Of Organization Matters

- Many Environments Are Overtly Or Implicitly Hostile To Bad News
  - It is seen as holding back progress
  - It is viewed as a sign of failure
  - It is politically unwelcome
  - You can become a target for retribution

- Choosing How To Act Depends On Knowing The Kind Of Organization You Are Dealing With
  - It is the background context that needs to be kept in mind

- What Happens In The Foreground Still Will Feel Relatively Consistent

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE
S E R V I C E S

Practice Delivering Your Message

- Delivering Bad News Is Stressful
  - It is not something that any of us like to do
  - While stress is a reality, it doesn't need to be an obstacle
  - It is possible to learn to work through fear and be effective

- Think About How You Will Shape Your Message
  - Prepare
  - Prepare some more
  - Possibly practice (really; this is useful)
  - Bring backup (information, certainly; people where necessary)
  - Deliver clearly and confidently

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE S E R V I C E S
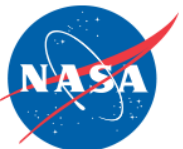
What Clear And Confident Looks Like

- Be Assertive
  - That means being precise, self-assured and direct
  - Communicate honestly, clearly and accurately
  - Avoid being vague, long-winded or talking around the issue

- This Can Feel Enormously Uncomfortable
  - When we are not used to communicating assertively, it can feel like aggression
  - It is not

- Assertive Communication Focuses On Keeping A Conversation In Balance
  - Your needs are met, along with those you are communicating with
  - Aggression is self-serving; it is about you, and not the impact on others
  - Passive communication is self-sacrificing; it is placing other needs first, at the expense of yours
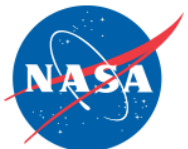
NASA_APPEL NASAappel

aPPEL | KNOWLEDGE SERVICES

Be Focused About What You Need To Deliver

- Define The Information That Needs To Be Communicated And Responded To
  - Focus on what needs to be understood
  - Manage to an appropriate level of detail
    - This will vary depending upon familiarity with what has happened to date
  - Be Clear About What Is Within And Outside Of Your (Broad) Control
    - What to watch for
    - What can actually be done
    - How to test whether it is having an impact
  - Focus On What Can Make A Difference
  - Work Towards Taking Action

- The Point Of Delivering Bad News Is Actually Doing Something About It
  - You are trying to guide that response in a direction that is positive and meaningful

NASA_APPEL NASAappel

aPPEL | KNOWLEDGE SERVICES

Get Agreement About The Problem

- First, You Need Acknowledgement That You Have A Problem
  - Recognition that the problem exists
  - Consistent understanding of the nature of the problem

- This Is Not Optional
  - It needs to be clear
  - It needs to be made explicit
  - Do not presume that everyone knows or agrees on the same thing

- Resist Attempts To Make The Problem Bigger Or More Expansive
 - Also resist attempts to minimize it or make it go away

NASA_APPEL   NASAappel

aPPEL KNOWLEDGE S E R V I C E S

Communicate The Impacts Of The Problem

- Communicate And Ensure Appreciation Of What The Problem Means

- In Defining The Impacts, Address These Points
    - How is the problem observable? What behaviors or actions show up?
    - What is the impact on the project?
    - What is the impact on people?
    - What is the impact on the organization?

- In Doing This, You Are Establishing Priority And Urgency In Addressing The Problem
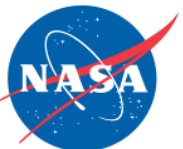   - Without responding to it, the consequence is that the impacts will persist

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES
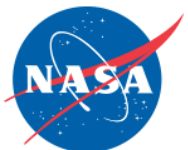
Define Options And A Pathway Forward

- Explore What Moving Forward Looks Like, To The Degree That Doing So Is Possible
  - It is also essential to be honest about what is possible, and what is not

- What Are The Options?
  - Are there any?
  - How viable are they?
  - What are the criteria what constitutes the most appropriate option?
- What Are Your Recommendations?
  - Where you are able to do so, what do you recommend and why?
- What Are The First Steps Forward?
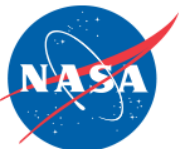 - Where there is agreement, where do you start in figuring things out?

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

Be Prepared For Pushback And Resistance

- We May Not Like To Deliver Bad News
  - Others don't like to receive it; they can push back and push back hard

- Resistance Can Take A Number Of Forms
  - Push back, disagreement, deferral or defensiveness

- The Underlying Reasons For Resistance Have A Common Foundation
  - Fear of a lack of (or loss of) control
  - Fear of being vulnerable

- Recognize When It Occurs
  - Identify what needs to be done to address or alleviate it

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

In Conclusion…

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

In Conclusion…

- Most Of Us Don't Like To Deliver Bad News
  - It is not our happy place; it makes us uncomfortable, and we fear the reaction of others
- Dealing With Bad News Is Nonetheless Our Job
  - Good project management isn't the absence of problems on a project
  - It is defined by how problems are responded to when they inevitably occur
- How Bad News Is Responded To Is Shaped By The Context And Values Of Our Organization
  - In some organizations, reporting and sharing bad news is discouraged or suppressed
- Sharing Bad News Effectively Requires Confidence, Clarity And Assertiveness
  - These behaviours can feel uncomfortable when we first try them out
  - They are absolutely essential to being listened to and fully heard
  - They frame the basis of solving problems meaningfully, fully and finally

NASA_APPEL   NASAappel

aPPEL | KNOWLEDGE SERVICES

Quick Webinars

Question & Answer Session

Please type a "Q" in front of any questions for the speaker in chat.

NASA_APPEL   NASAappel

APPEL | KNOWLEDGE SERVICES

36