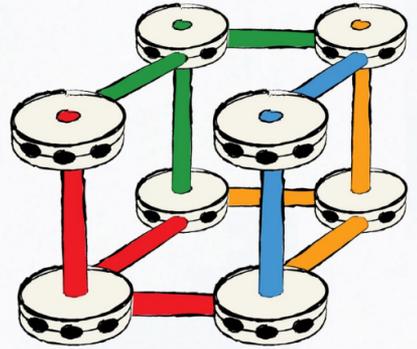


# PROJECT MANAGEMENT IN THE

# HYBRID



# WORKPLACE

Book Excerpt

PHIL SIMON



Award-winning author of *Message Not Received*  
and *Reimagining Collaboration*

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Project Management in the Hybrid Workplace

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# PREFACE

*“I think we all would have been a lot happier if they hadn’t landed a man on the moon. Then we’d go, ‘They can’t make a prescription bottle top that’s easy to open? I’m not surprised they couldn’t land man on the moon. Things make perfect sense to me now.’”*

—JERRY SEINFELD, *SEINFELD*, SEASON 5, “THE DINNER PARTY”

On July 20, 1969, Neil Armstrong took that historic “one small step.” To this day, NASA’s stunning scientific and technological achievement leaves me in awe. I still can’t get my head around the degree of coordination and collaboration involved in that remarkable feat. As a rabid fan of Jerry Seinfeld’s eponymous show, I’ve often pondered the depth of his astute assessment of the moon landing, including several times when I’ve worked on projects with people in different locations.

Like the one that I describe next.

## **Wanted: Professional Scribe**

An up-and-coming software vendor claimed to have built a better mousetrap in a critical business area. (Call it Bluth here, but it’s a pseudonym.) If a tree falls in a forest and no one is around to hear it, though, does it make a sound?



To help build buzz, Bluth bigwigs wanted to create a short but slick ebook to give away on its website in exchange for email addresses. Nothing earth-shattering here. For years, this marketing stratagem was standard industry practice to gather viable leads.

To this end, in mid-2021 Bluth commissioned a prominent multinational publisher—call it Sitwell here—to write and produce a 30-page ebook.\* Bluth needed the final product within three months, but ideally it would arrive sooner. Sitwell charged mid-five figures for its efforts—significant, but hardly ginormous for a well-funded company with grand ambitions such as Bluth.

Sitwell reached out to my agent, Matt, in search of a suitable ghostwriter. He in turn contacted me and explained the project to gauge my initial interest.

On the surface, the project fell squarely in my wheelhouse. After all, I'd called myself a professional scribe for nearly 15 years by that point. The topics also jibed with my writing and professional backgrounds: I had to fuse technology, enterprise software, analytics, productivity, collaboration, and automation.

### **Distant Early Warnings**

Still, it didn't take a rocket surgeon to identify the project's copious red flags. For starters, I'd be trying to please two masters in two countries in two time zones. Figure P.1 shows a highly unscientific map of everyone's physical locations.

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\* Yes, these are all *Arrested Development* references. RIP, Jessica Walter.

## The Geography of a Hybrid Writing Project



Figure P.1: The Geography of a Hybrid Writing Project

Now, if we'd all been working in the same location, I still would have been concerned. There's always a learning curve when working with new people and organizations. A project consisting of remote or hybrid work only makes the curve steeper.

Second, given the end-product's expansive and subjective nature, I wasn't keen on writing five pages without clear marching orders, let alone thirty. Not to worry, Matt had informed me. A Sitwell VP, Oscar, had told him that Bluth had previously signed off on the ebook's outline. Without having seen it, though, I knew that squeezing all of Bluth's requisite topics into a short yet cohesive ebook would be tight. Every paragraph was going to count.

Then there was the tech. During the preliminary call, I expressed my reservations to my agent and my primary Sitwell contact whom I'll call Lucille here. Here's one critical exchange from that seminal phone conversation:

**Me:** “Although this is our first time collaborating, I’ve got some concerns about how we’ll work together based upon my previous experiences on remote and hybrid projects.”

**Lucille:** “Such as?”

**Me:** “Sitwell wants to rely upon email—and that’s just not going to work here. We won’t be successful if we try to manage this project in our inboxes.”

**Lucille:** “Well, Phil, we have been at this for a while, but I’ll bite. What exactly did you have in mind?”

**Me:** “At a minimum, we need to use a proper communication and collaboration hub like Slack, Zoom, or Microsoft Teams. Each is tailor-made for this type of gig. I don’t want to brag, but I wrote books on the first two and know the last one reasonably well. Pick a tool. I’ll happily show everyone the ropes as a bonus.”

**Lucille:** “Hmm. I don’t know.”

**Me:** “Not to be rude, but this is a dealbreaker for me. I’ll pass on this opportunity if we all have to use email. I feel that strongly about it.”

**Lucille:** “Fine. We’ve got a company license for Teams, but we have never given it a shot. I’ve heard good things. You can be our guinea pig.”

Despite the apparent victory, I wasn’t doing cartwheels after the call. Several things still gnawed at me. First, although Microsoft Teams is a powerful communication and collaboration tool, it does not replicate the functionality of a proper project management (PM) application à la Trello, Basecamp, and Asana. I’d broached the

subject with Lucille after she agreed to use Teams, but she resisted embracing yet another new application.

Second, I didn't know how many Bluth employees would be working with me—and in which capacities. Was I collaborating with a single client contact or four? In hindsight, I also should have insisted that all of us formalize our roles and responsibilities in a simple matrix. Again, however, I didn't make this demand because I'm at least a little self-aware. I knew that I'd already pushed the envelope with this fusty publisher by drawing a line in the sand over email.

My reservations notwithstanding, I remained cautiously optimistic that our initial dialogue had laid the groundwork for a successful project. After the call, I signed on for a modest flat-rate fee. I was ready to proceed to Phase II: virtually meeting the Bluth folks and starting the writing process.

If we'd all lived happily ever after, I wouldn't be starting the book with this little yarn, but you probably deduced as much already.

## **The Project Kickoff**

A few days later, I participated in the introductory conference call with several Sitwell and Bluth stakeholders. I again voiced my concerns about how we'd communicate on and manage this project. (As Reagan said, "Trust, but verify.") Lucille's assurances aside, I was still a skosh skeptical. It's not like I had anything in writing at this point. What's more, I've known for decades that, when it comes to how we work, old habits die hard. I was also aware of the power dynamics of these types of engagements—a topic that undergirds this book.

For decades, Sitwell's standard operating procedure on these types of projects involved—you guessed it—email and Microsoft Word attachments. Those tools may have sufficed in 2001, but it

was 2021. There were far better ways to get things done on remote and hybrid projects.

To that end, I floated the idea that we all use Google Docs in lieu of Word. Doing so would:

- ☉ Let everyone collaborate on the same document in real time.
- ☉ Prevent multiple versions of the ebook from spiraling out of control. (Without traditional email attachments, no one could claim that they were looking at an old draft of it.)
- ☉ Let me rewind the document and reverse anyone's mistakes.

Stan, my primary Bluth contact, wholeheartedly concurred with me. I could tell he was tech-savvy. Like me, he realized that the processes Sitwell required everyone to follow were antiquated.

It didn't take long for Lucille to put the kibosh on that idea. She told everyone on the call that Sitwell had tried Google Docs years ago. Converting the file from Google Docs to Microsoft Word and then to Adobe InDesign for final layout had resulted in significant formatting issues that delayed the project. (You can't win 'em all.)

At least we all agreed that Teams would serve as the project's north star. *In theory*, this meant no email; everyone would be on the same page without having to search their inboxes for the latest updates. (I advised the group that I'd be creating a simple Google Sheet to track each chapter's progress. No, it wasn't a proper PM tool, but it did allow all project stakeholders to view a real-time snapshot of where everything stood.)

Although we'd ostensibly settled on the tech, another issue was gnawing at me. During the call, I picked up on a vibe that multiple Sitwell stakeholders would be chiming in on the ebook's content. All else being equal, the more cooks involved in this type of creative

project, the greater the opportunity for conflict, pissing contests, misunderstandings, and delays.

### **Familiar Patterns Derail the Project**

Fast-forward one month. Despite my best efforts and the verbal commitments of key stakeholders to stay the course, the simple ebook project had quickly devolved into a morass of confusing email threads, logistical challenges, and miscommunications.

Case in point: the final ebook outline. Oscar had indicated that it was a *fait accompli* before I'd signed on. In fact, no one had even started it; there was no document for anyone at Bluth to approve. I'd have to create one with Stan from scratch. Multiple Bluth *stakeholders* (plural) would have to bless it.

I'd worked with Stan over the course of two days to create a logical roadmap for the ebook that checked all his boxes. I was waiting for his input on the latest version of the outline when, without warning, he suddenly went off the grid on an IPO-related trip. This delay stopped my progress in its tracks.

Stan resurfaced two weeks later and shared the final outline with his colleagues. As I'd feared from the onset, Bluth execs refused to stay in their lanes and started chiming in. Several had offered structural, unsolicited, and contradictory feedback on the ebook's direction.

I was receiving a fixed fee for this project, and I'd already put in thrice as much work as I'd anticipated. It should surprise exactly no one that, at this point, we were already well behind schedule. The project's foundation was cracking—and fast. The parties were starting to get testy, myself included. Apart from that, though, things were going great. (Yes, I'm being sardonic.)

## **One Final Hail Mary**

I went old school, picked up the phone, and spoke with Lucille. It was high time that everyone talked. Exchanging more asynchronous messages would only exacerbate the issues, raise our temperatures, and further delay the project. Lucille wholeheartedly agreed with me about the need for a group call and ran the idea by Oscar. All systems go.

To find a mutually convenient time to meet, I created a scheduling poll in Doodle and shared it with everyone in the group. It clearly showed an array of options accounting for our different time zones. (Today the popular booking tool Calendly now does the trick, although plenty of folks foolishly believe that using it represents the acme of arrogance.)

Within two days, we'd all voted on our preferred options for a meetup. I finalized the mutually convenient meeting time and date in Doodle, automatically notifying everyone in the process. I then spoke privately again with Lucille. The two of us were sanguine that we could resolve the issues undermining the project and frustrating everyone involved.

The morning of the meeting, I awoke, brewed a cup of coffee, and checked my inbox. At the top was an urgent message from Stan to everyone on the chain. "This meeting time doesn't work for me," he wrote. "We will have to reschedule." (Stan didn't cite a last-minute emergency. Why he'd selected that Doodle slot in the first place mystifies me to this day.)

Back to square one.

Brass tacks: The very problems that I'd identified and tried to address prior to joining the project were nevertheless hindering it anyway. I'd come to the realization that this endeavor wouldn't end well. Despite my best efforts to set expectations and keep us on

track, my initial doubts about the project had metastasized. I politely exited stage left, and Sitwell paid me for my services rendered.

## **Postmortem Reflections and Outcomes**

In the days after I exited the engagement, I occasionally reflected on how a promising project had run off the tracks. To be sure, failure wasn't inevitable. Early conversations like the one I had with the Bluth and Sitwell stakeholders—and the ostensible buy-in they produce—should have greased the communication wheels. There's just one caveat, though: When project participants agree to use a set of tools and to follow a certain process, they must abide by those commitments. Mind-blowing, I know.

In hindsight, the ebook project stumbled out of the gate for a bevy of reasons. Participants' refusal to embrace new ideas, tools, and processes sits at the top of the list. Plain old stubbornness and aversion to change are alive and well.

To some extent, the team would have had to overcome these challenges if everyone had worked in a colocated environment. Make no mistake, though: The hybrid nature of the project exacerbated its underlying problems—and created new ones. The fact that the parties were located thousands of miles away from each other made sticking the landing even more challenging.

## **Coming Full Circle**

Let's recap.

More than half a century after the historic Apollo 11 landing, two successful companies and an experienced, tech-savvy writer located in three different time zones embarked on what appeared to be a short, straightforward writing project. The objective: to bang out a short ebook for mid-five figures within two or three months.

Initial project planning and discussions had produced participant commitments and assurances. Unfortunately, those had gone quickly by the wayside. As a result, the project stumbled out of the gate. Colocated employees at the two firms unsuccessfully tried to use technology to bridge the considerable proximity gaps. Communication among team members soon broke down, simple coordination proved challenging, and frustrations began mounting. Efforts to remediate the project failed. Within six weeks, the project had completely unraveled and the writer exited.

The short ebook finally saw the light of day more than six months *after* its initial deadline—costing the client untold leads. In the end, the project took thrice as long as its captains had originally conceived.

What does that woeful tale say about our ability to successfully complete more complex projects when we're not all in the office at the same time? Ditto for launching new products.

As usual, Seinfeld was right.

That's the cynical view. Believe it or not, though, I consider myself an optimist. Yes, projects in hybrid and remote workplaces pose a daunting array of human, technological, and logistical obstacles. Despite these realities, though, we *can* overcome them through a combination of new and proven techniques.

After all, we put a man on the moon.

# INTRODUCTION

*“I know that progress has no patience  
But something has to give.”*

—RUSH, “SECOND NATURE,” LYRICS BY NEIL PEART

During my days as a college professor, I lost count of the number of students who asked me if an upcoming exam would be hard. (No one is judging. I did the same thing when I was all of 19 years old.) After a few semesters of seasoning, I started answering the question with one of my own: Compared to *what*?

For context, college-level exams are harder than, say, becoming an Uber driver. (At least they *should* be. I believe in desirable difficulty. Students are products, not customers, but I digress.)

In his 2019 book *Super Pumped: The Battle for Uber*, Mike Isaac of the *New York Times* wrote about a new program that the controversial ride-sharing company had developed called UberX:

... an ambitious, low-cost model that turned nearly anyone on the road who had a well-conditioned car and could pass a rudimentary background check into a driver for the company. Allowing random citizens to drive other people around for money opened up a slew of problems, most notably that no one had any idea whether or not it was legal. At Uber, no one really cared.

In the eyes of Uber's less-than-scrupulous management at the time, its drivers should only need a pulse, a valid license, a smartphone, and a vehicle. After that, the drivers were pretty much good to go. This frictionless onboarding process was deliberate. Back then, Uber routinely asked municipalities for forgiveness *after* entering local markets, not permission *before* setting up shop.

At the other end of the spectrum is the pathway to becoming a chartered financial analyst, or CFA. It only requires passing three notoriously difficult four-hour tests. Topics include economics, derivatives, financial models, complex valuations, and ethics. You know, breezy stuff.

The CFA Institute reported in November 2021 that only 27 percent of test-takers passed Level I of the test.<sup>1</sup> Think of the CFA exam as the antithesis of Uber's driver-approval process.

## **Becoming a PMP**

Now let's turn to another valuable professional credential: the certified Project Management Professional, or PMP.

In terms of difficulty, the PMP exam lies somewhere between becoming an Uber driver and a licensed CFA. Getting your PMP ticket punched is a relatively straightforward and inexpensive process, but I can't provide its pass rate. The Project Management Institute hasn't published an official one since 2005.

Exam success rates aside, however, real-world project management is no walk in the park. The words *simple* and *easy* have never applied to the art of project management, no matter how many letters follow your name.

Exhibit A: Amazon lists more than 30,000 books with the keywords *project management* published *before* March 2020.<sup>2</sup> As a discipline, it has *never* been static and straightforward. The move to remote and hybrid work only adds another layer of complexity.

A tech-savvy twenty-four-year-old who aces her PMP test will soon learn three vital lessons when she starts applying her trade on the job. First, as is usually the case, practice is far messier than theory. Next, as the example in the Preface illustrates, the success of an ostensibly simple endeavor is hardly a given. Foolish is the soul who believes otherwise. Finally, even similar projects can suffer from vastly different issues. Having spent a career working on all sorts of projects, I should know.

## Entering the Time Machine

I'm turning back the clock. Don't worry: You'll still have a smartphone when you arrive.

It's now 2014.

*Guardians of the Galaxy* and Taylor Swift's *1989* rule the day. Outside of the entertainment world, technology lets you do plenty of things from the comfort of your own home: see a doctor, get in a workout, pick up a new skill by taking an online class, order millions of products for home delivery, and wildly overshare on social media.

To pay your bills, you've worked for the past decade as a dedicated PM for an old-school manufacturer. Last week, your employer took an unexpected step by hiring a trendy, tech-savvy digital-ad agency to run an unconventional digital marketing campaign.

As an experienced PM, you ask yourself the following questions about the forthcoming engagement:

- ④ What are the project's objectives, and how will we measure them?
- ④ What's the deadline to launch the campaign?
- ④ What's the budget?

- ④ What tools will employees use to communicate, collaborate, and manage the project?
- ④ What are the project's risks?
- ④ What's the definition of *done*?

The answers to queries such as these will in part determine whether this project is ultimately successful. Equipped with no additional information, you're pessimistic. The two companies' disparate cultures aren't likely to jibe.

Again, you're no neophyte. You're well aware of the challenges related to managing projects and launching products. What's more, you know that these obstacles aren't confined to client-vendor relationships like the previous one. They plague all sorts of arrangements in which people from different organizations attempt to build something from scratch.

### **Another Scenario**

Let's stay in 2014 for a moment but slightly change the circumstances. Two different departments *within the same organization* launch a new product. Surely, things will go relatively smoothly, right?

Not necessarily.

Even when the same logo adorns everyone's business card, it's folly to assume that everyone in these two groups will play nice with each other. Cohorts under the same roof sometimes despise each other. (As many of those 30,000 PM books detail, projects involving "internal customers" frequently suffer from the same problems that vex client-vendor relationships.)

### **Back to Reality**

Now let's return to the present day. You no doubt own a better smartphone than you did in 2014 but, thanks to COVID, the world

is dramatically different on a number of levels. The pandemic accelerated many existing trends, as the following statistics demonstrate:

- ④ **Healthcare:** The number of physicians offering telehealth jumped from 25 percent in 2018 to almost 80 percent in 2020.<sup>3</sup>
- ④ **Ecommerce:** Worldwide, it increased 19 percent from its prepandemic level in 2020.<sup>4</sup>
- ④ **Home fitness:** With gyms closed, millions of people started working out at home. Many industry types wonder if traditional gym memberships will ever revert to their prepandemic levels.<sup>5</sup>
- ④ **Higher education:** The number of enrollments in online courses grew 93 percent between fall 2019 and fall 2020.<sup>6</sup>

Perhaps no change has been more significant—and more welcome—than how we work.

### **No Going Back (to Work)**

It's tough to envision any of these trends suddenly reversing—especially the explosion in remote and hybrid work. Most of us freakin' love the flexibility that our new professional digs afford us. (The one regular exception: cranky old-school managers, but we'll get to them later.)

Americans aren't alone in clamoring for fundamental and permanent change in where and when they clock in. In February 2022, Belgium became the latest country to mandate four-day workweeks. Citizens can now legally ignore their bosses' entreaties after the workday ends without fear of reprisal.<sup>7</sup> Take *that*, Belgian Lumbergh.

Count me among the millions of people who are saying *good riddance* to the unspoken, arbitrary, and archaic rules around office

hours. We won't miss workplace cultures that value face time over results. My disdain for each impeded my career progress. More than once, my temerity to leave work at a reasonable hour on a normal workday led to a heated conversation with colleagues or my manager.

Still, a world predicated on hybrid and remote work isn't all sunshine and lollipops. With respect to completing projects and launching new products, our new work environs introduce all sorts of thorny problems and exacerbate existing ones.

### **Size Matters: Lessons From *Small Giants***

In his 2007 book *Small Giants: Companies That Choose to Be Great Instead of Big*, Bo Burlingham describes how some small-business owners paradoxically *declined* growth opportunities because of their greater ambitions. (Yes, you read that sentence correctly.) A few of these contrarians even decided to voluntarily shrink their businesses—and not because investors had pressured them to do so.

Perhaps this counterintuitive move isn't so odd after all. To paraphrase a line from the *Cheers* theme song, some people would rather work at places where everybody knows their name. Employers often benefit too from cozier environs, as workplace friendships can improve a company's bottom line. Apart from reduced turnover, three decades of research have demonstrated that workplace collegiality generally enhances employee productivity and morale. You're less likely to slam Milton in accounting over email if you enjoy playing tennis with him every Saturday morning.

Now, I don't want to overstate Burlingham's case. No company is perfect, *Small Giants* included. (In his book, he doesn't contend otherwise.)

Size matters, but so do time and location. Two simple but magical things *can* happen when we work with our colleagues in the same

physical location at the same time: We get to know who they are, and we get to know what they do.

Also, just because we work at the same time and location as our colleagues doesn't mean that we know what makes them tick, much less what they're up to. (Dunbar's number is alive and well.) Conversely, just because we work remotely doesn't mean that we don't know our colleagues, much less what they're doing on any given day. As I detail in my previous book *Reimagining Collaboration*, internal collaboration hubs such as Slack and Microsoft Teams promote organizational transparency when used properly.

Indeed, projects and new products can still break bad under ideal circumstances. Neither amicable workplace relations nor complete transparency ensures success. The act of creating, building, or launching something new is anything but simple.

## **The Big Question at the Heart of This Book**

Now, consider less-than-ideal circumstances—the antithesis of a Small Giant. Picture a decidedly impersonal generic remote or hybrid work environment. Say that you've never met your colleagues in real life, or IRL, as the kids say.

This type of virtual room is much harder to read. As a result, we're much less likely to intuit each of the following essential three pieces of information:

1. Where our colleagues, direct reports, and managers are working.
2. When they're working.
3. What they're working on.

And good luck learning about other key constituencies, such as our clients, partners, and vendors.

Let the following meaty question serve as the fulcrum of *Project Management in the Hybrid Workplace*: How are we supposed to successfully complete projects when we often don't know where and when essential contributors are working and what they're doing?

This book argues that the world of work has fundamentally changed—for good. As such, ways in which we manage projects and launch products must change also. We don't need to start with a blank slate, but we need to reevaluate old doctrines and see if they still apply. In some cases, they certainly do. In others, however, we need to adopt some new norms and prescriptions—ones that specifically address the realities of remote and hybrid work environments.

### **The Choice to Emphasize Project-Based Work**

Thanks to COVID, we do lots of things differently, some less frequently, and others not at all. (Been to the movies lately?) At least one thing has remained constant during the pandemic, however: the distinction between the types of work that employees perform. Regardless of who's doing it and where or when it takes place, work generally falls into one of two buckets:

1. Project-based work, including project management and product launches.
2. Routinized or standardized endeavors, such as answering calls or processing insurance claims.

This book examines the former and intentionally ignores the latter. I feel compelled to explain my rationale.

The late coach of the Oakland Raiders and iconic broadcaster John Madden once said, “If you've got two starting quarterbacks, then you've got none.” As a parallel, to write an effective business book, authors need to make conscious choices. The well-intentioned

scribe who pens a book for *everyone* in fact writes it for no one in particular.

Let me be absolutely clear: My decision to concentrate on project-based work is neither a snub nor some type of moral judgment about the value of certain types of jobs. This type of work isn't inherently "better" or more valuable than its routine or standardized counterpart.\* It just poses different challenges—ones complicated when people work in different locations and time zones.

On a different level, certain jobs have remained *relatively* unaffected by the shift to remote and hybrid work. Examples include dental hygienists, short-order cooks, and DoorDash delivery drivers. Not all that much has changed.

Alternatively, what if you worked as a customer service representative prior to March 2020? Lockdown changed *where* you worked, but not the following:

- ☹ How you worked.
- ☹ When you worked.
- ☹ What you needed to accomplish while on the clock.

In fact, many of the nearly three million customer service representatives in the United States<sup>8</sup> have been fielding calls from their homes for years. I'm sure that I've even met a few of them. (I live about 30 minutes from LiveOps headquarters in Arizona, a company that some have termed *the Uber of call centers*.<sup>9</sup>)

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\* Celine Dion and Britney Spears reportedly earned about \$500,000 per show during their Las Vegas residencies.

## A Trip Down Memory Lane

I know a thing or two about answering calls all day long.

Between college and grad school, I worked for a year at Sony Electronics in its northern New Jersey office as a customer relations representative. From 8 a.m. to 5 p.m. every day (with an hour for lunch), I answered calls from customers displaying varying degrees of vitriol. Parents with busted camcorders hosting a birthday party for their young child next weekend were often apoplectic from the moment I uttered the words, “Thank you for calling Sony. This is Phil. How can I help you?”

Sony made quality CD players and car stereos, but happy customers don’t wait on hold for ten minutes because everything’s fine. (Hello, availability bias.) To be fair, I understood their anger. (Over the past three years, I’ve politely but firmly laid into the Dacor reps over my refrigerator—and subsequent replacements—malfunctioning, but I digress.)

Had I still been working in the same capacity when COVID-19 hit, I can say two things with absolute certainty. For starters, I could have performed my job at home. Truth be told, my current home office beats my old gray cubicle hands down.

Location aside, however, I’d be miserable. A person can only take so much abuse. The Quality Assurance and Training Connection reported in 2015 that call center turnover typically runs at between 30 and 45 percent per year.<sup>10</sup> I can’t imagine that number dropping during the Great Resignation, but we’ll get to that shortly.

## **A Multidisciplinary Approach**

This book is far wider than deep. In the pages that follow, I reference and stitch together a panoply of different fields, books, studies, and theories. This decision is very much deliberate; there's a method to my madness.

Whether they've garnered their PMP certification or not, experienced PMs know that theirs is a multifaceted field encompassing a slew of indispensable domains. Managing a project or launching a product isn't easy, regardless of your specific role, business function, organization, or industry.

Consider Val, a hypothetical PM who exhibits excellent interpersonal, technical, organizational, and delegation skills. He's a nice enough bloke. Despite repeated coaching, however, he's just not able to see how his projects fit into his company's long-term strategy. As a result, Val often makes questionable project and product decisions that frustrate his colleagues and hurt his employer's bottom line. It's only a matter of time before he'll have to move on.

## **Who Should Read This Book**

*Project Management in the Hybrid Workplace* casts a wide net and targets a diverse set of readers. A number of groups come to mind.

### **Product Peeps**

The first cohort consists of what I'll affectionately call *product peeps*. As its name suggests, a *head of product* oversees product development within an organization. The individual in this critical role is ultimately responsible for:

- ④ Setting the long-term vision and strategy for the company's product(s).

- ④ Delivering new features for existing products and products altogether.
- ④ Ensuring that the product meets a company's target audience and keeps up with competing offerings.

Note that the nomenclature around this position is anything but uniform. For instance, since its 2006 founding, Twitter has employed many people in the role of *VP of Product*.<sup>\*</sup> (Twitter and executive stability have never been synonymous.) A company down the street might use the moniker *chief product officer* for essentially the same role. *Product manager* is a more junior position.

### Seasoned PMs

You realize that the struggles on projects in remote and hybrid workplaces are real. Specifically, the same PM techniques that worked so well pre-COVID no longer hold water. You're wondering if you need to tweak your tried-and-true approach to your craft. This book will help you overcome the new challenges that you're going to face when everyone works in different places and at different times.

### Service Providers

We've seen an explosion of people who run marketing, design, and other types of shops. The same holds true for freelancers who routinely build things for—and provide services to—their clients. Make no mistake: These are projects.

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\* It's accurate to call the company's early culture dysfunctional, as Nick Bilton describes in his fantastic 2014 book *Hatching Twitter*.

## People Who Hire Service Providers

The next cohort represents the flip side of that coin.\* Examples here include:

- ④ Executives who make decisions on which partners to contract.
- ④ Small business owners.
- ④ People who work in their organizations' project management offices.

At a high level, many old-school business owners didn't exactly embrace remote and hybrid work—and perhaps they still don't. I get it. They didn't get to work from home, so why should their employees? However understandable that mindset, employers who attempt to revert to the prepandemic M–F/9–5 model will have a hard time filling their open positions. Rather than fight the inevitable, why not get on board? This book will help mature and successful business owners think about project and product management in the context of the brave new world of work.

## Individual Contributors

Let's say that your profession and current job regularly involves working on internal projects. I'm talking about coders, web designers, testers, and other folks with no PM responsibilities. Maybe you've never viewed your work through the lens of a proper project before.

## PM Newbies

Maybe you're new to the field of project management or you're thinking about getting into it down the road. In either case, you won't have trouble paying your bills. PMI estimates that employers

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\* Yes, I'm thinking of DeNiro's iconic scene with Pacino in *Heat* as I write these words.

worldwide still need to fulfill tens of millions of positions involving project management.<sup>11</sup> You won't learn *everything* you need to know about the subject here. Think of this book as a primer—one that provides a broad overview that may whet your appetite to learn more.

## **Students of Project Management**

Untold numbers of colleges and universities offer classes, certificates, and undergraduate and even graduate degrees in the field of project management. Students taking related PM classes will benefit, as will professionals who have enrolled in executive-education programs.

No, this book doesn't supplant the need for formal project management textbooks. These massive tomes typically emphasize theory over practice. In this vein, *Project Management in the Hybrid Workplace* serves as a valuable, real-world complement.

To state the obvious, these groups can and do overlap. For instance, a graphic designer is working toward her MBA at night. A management consultant is pondering going in-house and taking a client-side job.

## **What Else You Need to Know**

We live in an era of listicles, short attention spans, modularized content, and TikTok videos. Reading a decent-sized book on a subject might seem like a big commitment. Here are some beneficial things to know from the start.

## **Story Matters Here**

On March 31, 2009, AMC, the pioneering TV network behind *Mad Men* and *Breaking Bad*, launched a splashy new marketing campaign under the slogan: "Story Matters Here." The three-word motto has deeply resonated with me ever since.

This book adheres to a similar philosophy. In the following pages, you'll find plenty of statistics, charts, citations of academic studies, and references to books. To underscore certain points, I've deliberately included detailed case studies and examples, many of which reflect others' experiences. My goal is to strike the right balance between theory and practice. Ideally, each element complements the others.

In a similar vein, the examples and case studies in this book run the gamut. I've balanced wise decisions from Amazon, Automattic, GitLab, and others with cautionary tales from other companies, a few of which I referenced in the Preface.

## Assumptions

I'm also making several assumptions about you, dear reader:

- ① **You're intelligent and curious.** You don't just want to know what; you want to know *why* as well. To sate your quest for knowledge, you'd like easy access to references and links. I've provided them in footnotes and endnotes. Skip them if you like, but you won't have to go hunting for sources if one piques your curiosity. (Thank you, Google and the Internet Archive.)
- ② **You prefer a conversational writing style to an academic one.** You respond better to simple and direct sentences. You'd rather the author of a book avoid using polysyllabic words such as, well, polysyllabic. (I'm with you. *Use*, never *utilize*.)
- ③ **You've got a sense of humor and appreciate a little snark.** If you believe that plenty of business and PM texts are difficult for readers to digest, then you've found the right book. This one's not like that. I'm a fan of pop-culture references and humor, although my allusions and jokes won't always land.

There are plenty of boring speakers and writers, but there's no such thing as a boring topic. Project management is no exception to this rule.

### **Truth in Advertising**

The following pages provide essential guidance for managing projects and launching new products in remote and hybrid workplaces. The prescriptions are both tactical and strategic. Together, they will help employees, product and project teams, departments, and entire organizations avoid the pitfalls that frequently plague these endeavors.

Let me be clear: This book doesn't advance a new methodology for managing projects or launching products. Its context and advice apply equally to the existing methodologies. In this sense, *Project Management in the Hybrid Workplace* is less of what some might call a big-idea book than its predecessor.

By comparison, my previous book *Reimagining Collaboration* revolved around a big idea: the hub-spoke model of collaboration. Teams, informal groups, and even entire companies can—and should—integrate all their workplace applications into a single, cohesive whole. By doing so, they can realize manifold benefits: improve their communication and collaboration, reduce multitasking and employee burnout, and build the foundation for the forthcoming advancements in artificial intelligence and machine learning.

Yes, there's a certain degree of overlap between the two books. In both, the author brings his inimitable style, penetrating insights, sharp wit, and brooding intensity. (Too soon?)

Kidding aside, the two books are complements, not substitutes. Communication, collaboration, and project management are adjacent business disciplines. Apples and coconuts they are not. A team

of web designers building a new site for its client can't manage the project in isolation. Finally, and as mentioned earlier, both books tackle their respective subjects in multidisciplinary manners.

## **Plan of Attack**

This book consists of three parts. Part I provides a quick overview of the massive changes that have reshaped countless workplaces since March 2020. The ramifications for traditional project and product management are, in a word, profound. More than ever, successfully building new things and launching new products requires adopting a different mindset. Some prior PM tools and methods undoubtedly still apply; others, however, need to move from optional to imperative.

Part II offers a high-level overview of project management. It then analyzes the second-order effects stemming from the explosion of remote and hybrid work. To be sure, employees have welcomed its arrival. Still, as the story in the Preface demonstrated, we now must overcome greater friction and different challenges when working on projects and launching new products.

We then move on to Part III, the crux of this book. Each chapter provides a prescription to increase the odds that projects succeed in hybrid and remote workplaces. Collectively, these recommendations will help informal groups, formal teams, professional-service firms, and organizations of all types navigate this new world of work.

## **An Essential Disclaimer**

In his excellent 2011 book *How: Why How We Do Anything Means Everything*, Dov Seidman advocates adopting a few guiding principles rather than creating a labyrinth of individual rules.

For example, consider Google's famous internal "Don't be evil" credo. Those three simple words obviated having to create dozens

of disparate, confusing, and possibly contradictory dicta governing employee behavior. The number of people who love reading and writing detailed policy manuals is exactly zero.

Maybe a Googler did something questionable or behaved in an unethical manner. (Hello, Andy Rubin.<sup>12</sup>) Against a backdrop of “Don’t be evil,” the resulting conversation with the offending employee is relatively simple; the question never hinged upon whether he technically violated an obscure HR policy. (Interestingly, Google updated its internal code of conduct in May 2018. Employees should now strive to “Do the right thing.”<sup>13</sup> I suspect that company lawyers sanctioned the change.)

This book abides by the same principle-based approach as Seidman advocates and Google’s management follows. General prescriptions matter more than a slew of individual rules or a detailed checklist. On any given project, adhering to the advice in Part III guarantees exactly zilch. Rather, the guidance only increases the chances of a successful outcome. The following blackjack analogy will illustrate my point.

### **Hit Me**

Say that you’ve got 15 and the dealer is showing a six and no, you’re not counting cards à la *Rainman*. Should you hit or stick?

In this simple case, standing maximizes your chances of winning the hand. The dealer has to hit and will bust 42 percent of the time. Although standing is no guarantee of success, it’s the correct statistical play and maximizes your chances of winning. Take a card if you like, but don’t be surprised if your more experienced tablemates promptly walk away upon completion of the current hand. They know that

you don't understand the correct strategy, and they don't want you screwing things up for them.

By the same token, following all the advice in this book won't ensure that you'll meet your project's objectives in any type of work environment, never mind all of them. Ignore all this book's recommendations, and your project may still miraculously wind up a rousing success. Neither extreme, however, is likely.

Strap in. Get ready.