



# AUTODESK UNIVERSITY 2015

IT10815

## Customized CAD Management and Nimble Tech Leadership

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### Learning Objectives

- Discover which skills are linked to managing and which ones are needed for leadership
- Learn how to develop the tools you need to identify situations and learn how to identify what skill to apply to make progress
- Learn how to balance your efforts for doing things right and doing the right things
- Learn how to blend the traits of an effective manager with those of a great leader

### Description

Everything in your technology environment is changing. In order to lead, you need to be nimble enough to change with it. We will look at the skills of your position and see how you can blend technical skills, management prowess, and leadership dynamics together to make you the most effective leader. You can improve your effectiveness by knowing what skill to apply to each situation. We will show you how to identify the situations where leadership is the most effective approach and the situations where management skills need to be applied. Making the wrong call about which role you need to take can cripple your effectiveness. Come away with the tools you need to customize your methods to the moment and be more nimble and productive. 60 minute format.

### Your AU Experts

*Mark has more than 25 years of hands-on experience with technology. He is editor of caddmanager.com and bimmanager.com. He is fully versed in every area of Management from deployment planning, installation and configuration to training and strategic planning. As an internationally known speaker and writer, he is a returning speaker at Autodesk University since 1996.*

*He writes the monthly "CAD Manager" column for AUGI World magazine. He served for 6 years on the AUGI Board of Directors, served as AUGI President for 3 years and also as AUGI Executive Director. Mark is currently serving as Director of Information Technology for SIATech, a nationwide public charter high school focused on dropout recovery.*

## Customized Management and Nimble Leadership

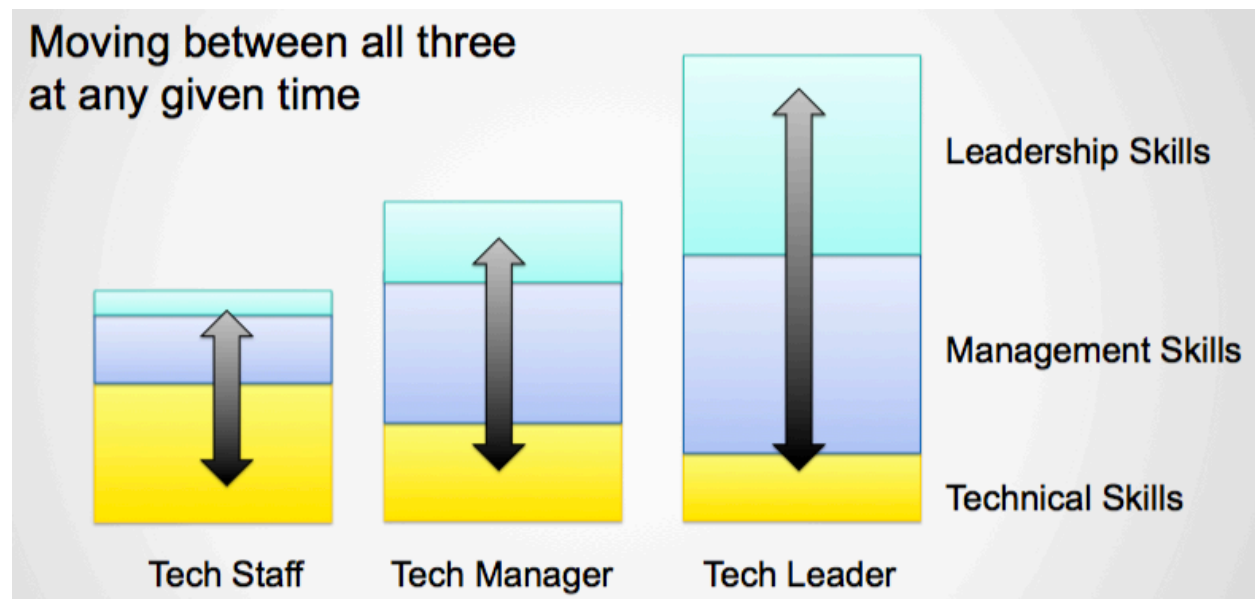
One size does not fit all. You have heard that over and over. You know its true when you try to buy clothing that is labeled “one size fits all” which means that this size fits some. You may try it on and see that it is to tight, too loose, too short, too long or whatever it might be. It obviously does not fit you. Leadership and Management are the same way. There is not predefined, one-way to lead or manage all people. Trying to do that will result in conflict and frustration at best and outright rebellion and heated words at worst. I know. I have fallen into that trap. I have seen tough times come because I tried to lead or manage everyone the same way.

A leader has to bend and shape their leadership into a manner where people can be encouraged, engaged, energized and mobilized in a way that work for each of them individually. It is not easy but it does pay off.

**The Blend** - Discovering which skills are linked to tech skills, or managing and which ones are needed for leadership

Tech Managers have to blend Technology skills, Management prowess and Leadership know how together.

They need to move between all three at any given time.



But you cannot change everything for everyone all the time. That is called anarchy. Some things have to be firm and in place. You cannot be flexible in everything just as you cannot be unchanging in everything. A leader has to recognize and change as needed and when it is appropriate. And it is hard to know when to customize your leadership. Get it right and things click. Get it wrong and things get

rough. Just like customizing your software can make you a better performer, customized leadership and management can make your team work better.

**Things To Not Change Much** (notice I did not say “never change”).

There are many things that should not be allowed to slip. Even small slips if left uncorrected can soon spawn more slips and slides that deteriorate the entire efforts of all.

**Expectations of Quality.** Some say never sacrifice quality for any reason. I wholeheartedly agree for things like healthcare, safety, child protection, data security and many more. Holding the line and setting the bar high is needed in many, many areas. Leaders set the pace and often allow a slip in quality to happen without realizing it. Keeping a focus on quality will improve every area of your team’s efforts.

**Expectations for Level of Effort.** Make the level of effort match the need for quality and completeness. Like a BIM model, sometimes level of effort needs to be dialed back a bit because the return on infinite detailing is small. Keep the focus on what is needed to achieve the goal. Expect more and you will get more, I have been told. Expect your team to put out a high level of effort on every task that is approached. Give it your all – all of the time.

**Expectations of Professionalism.** Respect, honesty, trust, graciousness, helpfulness, humility and sharing of knowledge are a few things that should be on your list of expectations. Everyone deserves to be treated professionally. Every person that you and your team interacts with should be treated as someone who deserves the best you have to offer at all times.

**Expectations of Customer Service.** Excellent service and extra efforts from those who you lead should be something that they all strive for. Service focus that goes beyond just what is expected and moves toward exceptional support and contributions. Providing more information, explanation, support, assistance and provisioning approached with vigor, under budget and delivered as agreed. Go the extra mile.

**Expectations on Deliverables.** Leaders should put forth the expectation that all deadlines will be met or exceeded with the expected delivery or even more. On time, under budget and high quality as agreed. If a deadline and quality expectation is defined and agreed to – strive to exceed that expectation on every task or project.

### Things That Should Be Customized

Customizing your approach to fit the person or situation has been suggested by many authors. It is what the best leaders do. They adapt and shape their style based on the people they lead and the project, task or environment they are in.

What do they adapt?

**Methods of Communication.** I have seen this in action and it works great. When I am trying to interact with people, I try to adapt my communications to fit the audience. I will use different



wording and tools. I have some that will reply to emails, others that instantly get back to me via texting. And still others that respond well from their desk using Instant Messaging tools. You should look at how you communicate and the tools you use. Change it up a little and try different methods and wording to see what might work for some groups and use others for the next team. See which works and move toward that method.

**Methods of Production.** Setting the goals and targets that need to be hit along with the deadlines really do make a leader into someone to follow, but there may be times when the “how” of getting things done needs to be left to the team member. They may know something you do not. They may have processes that will get the job done better than what you might be thinking. They may have shortcuts and tricks that seem outlandish but produce the desired outcome that you desire. Let people be creative in how they get things done.

**Methods of Interaction.** Just like communication, your methods of interacting need to bend and shape to the need. Some like meetings others hate them. Some will respond to thinking independently and then presenting to the team. Some might want to run everything past you as they move forward in an iterative process. Some may want to break into smaller teams of 2-3 and work together to set the pace. Letting people work in ways that they enjoy and can be productive will unleash new energies.

**Methods of Motivation.** Just like people wanting to define how they work, many like to define the way they are rewarded. Each and every person will respond to motivation options in differing ways. Some may go for money. Some may want time off. Some may want advancement or being put on a specific team or project. Some may like gift cards. Some may want to be introduced to your contacts. Some may want to just sit and pick your brain. The list is endless and varied. Don't try to put everyone into the same bucket for motivation.

By being flexible and customizing your approach you can achieve more. By changing things up a little, you can go a long way.



Let's look at the areas that need to be customized. Here is a short list of skills that you might operate with:

Tech Skills	Management Skills	Leadership Skills
Installation	Project management	Strategic planning/vision
Feature Knowledge	Vendor management	Great networking
Configuration	Project responsibility	Collaboration
Standardization	Team/personnel development	Great listener
Enhancement	Delegation/division of labor	Empathy
Troubleshooting	Problem solving	Motivational
Customizing	Solid communicator	Leadership development
Process Development	Consistency	Influence/persuasion
Integration	Honesty	Profit & loss accountability
Quick Learner	Change management	Authenticity
Research		Consistency
Testing		Great Communication
		Change implementation
		Emotional intelligence

## The Need to Customize your Approach

### Tech, Management and Leadership are not equal

- You fix Software - You Manage things – You Lead people
- Technicians work with programs, software and hardware
- Managers work with processes, structures, and systems
- Leaders work with people, emotions, and motivation.

### Tech skills without management

- Gets software working but used incorrectly
- Finishes the file/model but misses the deadline
- Is annoyed by others who cannot keep up

### Management skills without leadership

- Gets you trapped in Rules
- May end up mired in the Details
- Reduces everything to a checklist
- Soon settles into repeating outdated methods

### Leadership without Management or Tech skills

- Ends up being just wishful thinking
- Never gets anything done
- No credibility



## A Foot in Both Worlds – You cannot live in just one mode

The Tech Manager has to slide in and out of leadership, management and technical rolls. They have to perform well in all three.

Tech Focus	Management Focus	Leadership Focus
Troubleshoots software	Troubleshoots projects	Troubleshoots Teams/Firm
Improve Functionality	Improve Execution	Improve Teamwork/Motivation
Tech training	Defines Projects and Tasks	Builds Capacity
Customizing / Programming	Planning	Vision casting
Gets software working	Gets projects working	Gets whole firm working

You may move from one column to another at any given time

Example:

**Problem: Your system is failing to produce consistent plots and a project deadline is looming.**

Issue	Skills needed
Diagnose the issue	Tech Skills
Define a workaround	Tech Skills
Find the root cause	Tech Skills
Fix the problem and get the project plots correct	Tech Skills
Tell the entire project team	Management Skills
Make sure the fix is applied to all files on the project	Management Skills
Make sure other projects are not affected	Management Skills
Let all Project Managers know that the problem is fixed	Leadership Skills
Inform executive management of the problem and the solution	Leadership Skills
Upgrade software with a patch to fix the issue	Tech Skills
Notify consultants of the issue so they are not impacted	Leadership Skills
Update standard if needed to avoid problems in the future	Management Skills

## Situational Leadership

Learning how to blend the traits of an effective manager with those of a great leader

### What is Situational Leadership?

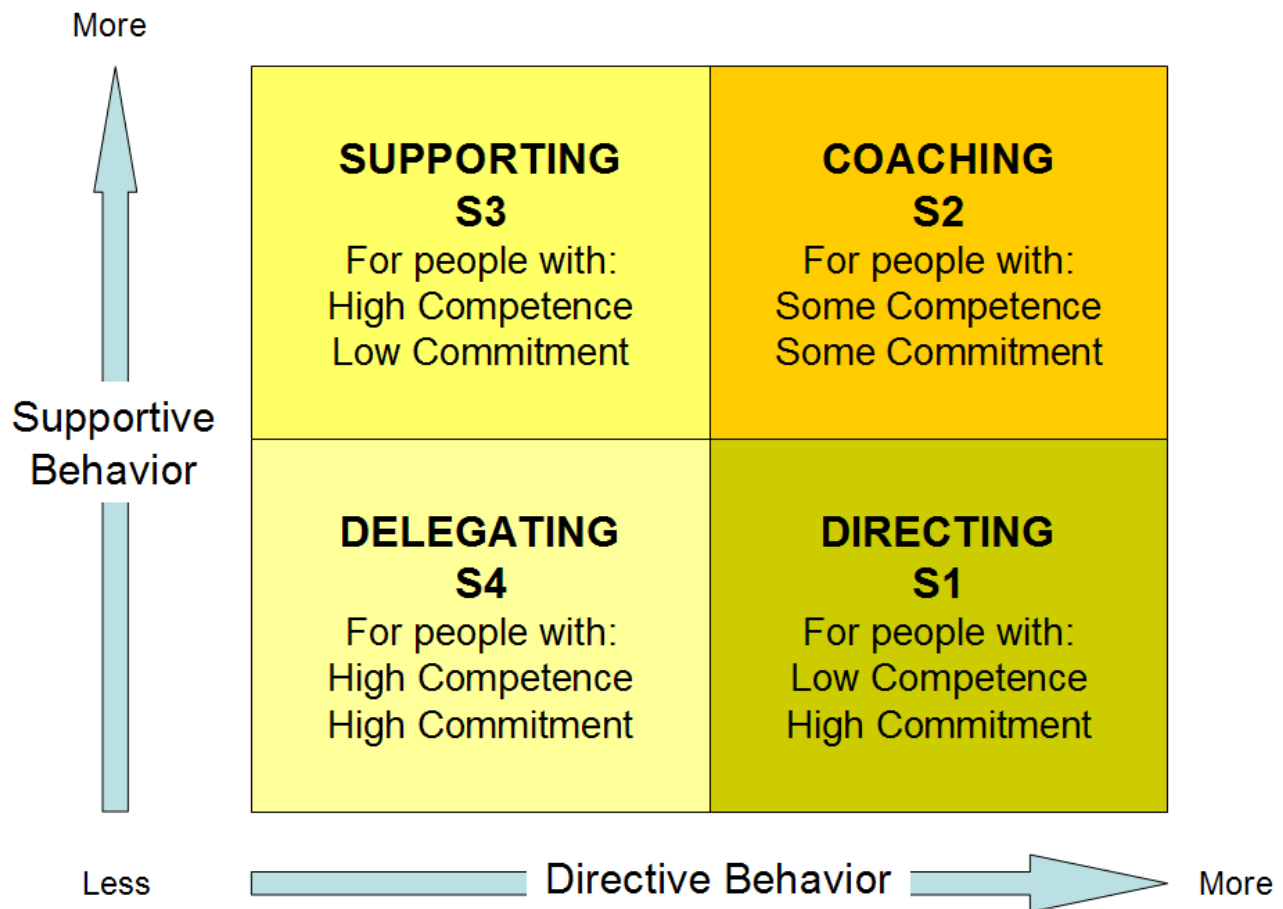
The Situational Leadership method from Ken Blanchard and Paul Hersey holds that managers must use different leadership styles depending on the situation. The model allows you to analyze the needs of the situation, and then use the most appropriate

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leadership style. Depending on employees' ability in their task areas and commitment to their tasks, the leadership style should vary from one person to another. You may even lead the same person one way at one time and another way at other times.

Blanchard and Hersey characterized leadership style in terms of the amount of direction and of support that the leader gives to his or her followers, and so created a simple matrix.



#### Supportive Behavior of the Leader

- S1 - Telling / Directing** - High task direction, low relationship focus - leaders define the roles and tasks of the 'follower', and supervise them closely. Decisions are made by the leader and announced, so communication is largely one-way. This style works well for people who lack competence but are enthusiastic and committed. They need direction and supervision to get them started.
- S2 - Selling / Coaching** - High task direction, high relationship focus - leaders still define roles and tasks, but seeks ideas and suggestions from the follower. Decisions remain the leader's role, but communication is much more two-way. This is for people who have some competence but may waver on commitment. They need direction and supervision because they are still relatively inexperienced. They also need interaction to build their self-esteem, and involvement in decision-making to invigorate their commitment.



- **S3 - Participating / Supporting** - Low task direction, high relationship focus - leaders pass the day-to-day decisions to the follower. The leader facilitates and takes part in decisions, but control is with the follower. This type is for people who have competence, but lack confidence or motivation. They do not need much direction because of their skills, but support is necessary to bolster their confidence and motivation.
- **S4 - Delegating** - Low task direction, low relationship focus - leaders are still involved in decisions and problem-solving, but control is with the follower. The follower decides when and how the leader will be involved. This is for trusted people who have both competence and commitment. They are able and willing to work on a project by themselves with little supervision or support. They can be trusted to produce under the overall vision provided.

Effective leaders are versatile in being able to move around the matrix according to the situation, so there is no style that is always right. However, most of us tend to settle into a preferred style.

### Development Level of the Follower

- **D4 - High Competence, High Commitment** - Experienced at the job, and comfortable with their own ability to do it well. May even be more skilled than the leader.
- **D3 - High Competence, Variable Commitment** - Experienced and capable, but may lack the confidence or desire to go it alone, or the motivation to do it well / quickly.
- **D2 - Some Competence, Low Commitment** - May have some relevant skills, but won't be able to do the job without help. The task or the situation may be new to them.
- **D1 - Low Competence, High Commitment** - Generally lacking the specific skills required for the job in hand, but is very excited to try.

Similar to the leadership styles, the development levels are also situational. A person could be skilled, confident and motivated for one part of their job, but could be less competent for another part of the job.

### Leadership Style must match the Development Level

Blanchard and Hersey said that the Leadership Style (S1 - S4) of the leader must correspond to the Development level (D1 - D4) of the follower - and **it's the leader who adapts**

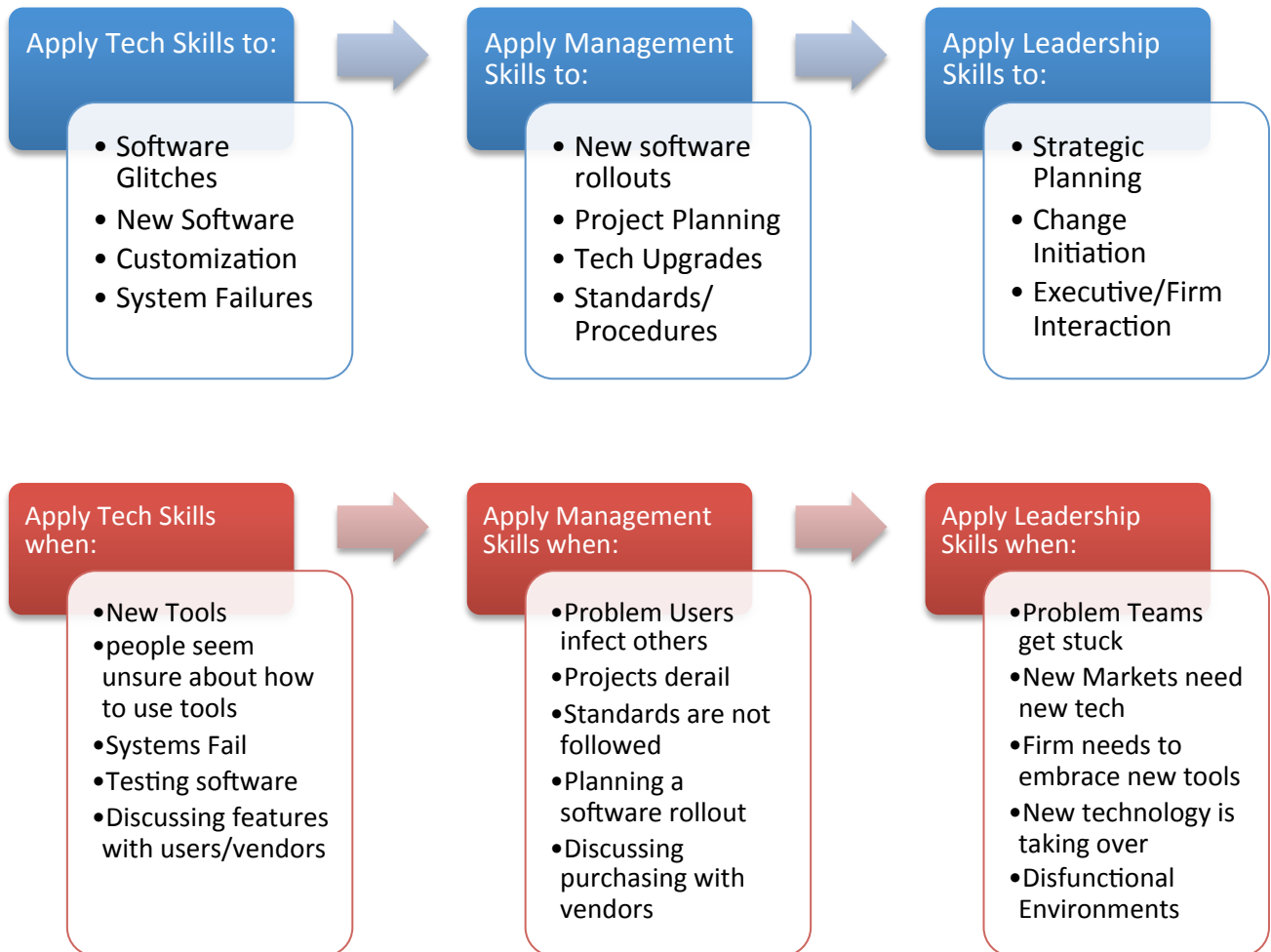


## Learning how to develop the tools you need to identify situations and learn how to identify what skill to apply to make progress

According to Michael Watkins in Harvard Business Review, you need to be perceptive.

- Level Shifting – moving between details orientation and the big picture thinking
- Pattern Recognition - Discerning casual relationship between events and people plus separating the message from the noise
- Mental Simulation - Thinking through the impact of the situation or solution

### When to use which one



## How to know you are using the wrong skill

### When Applying a Tech Skill

- Users feel demeaned (you think you know more than me?)
- Managers don't really care about the tech issues
- You forget to negotiate with Vendors

### When applying a Management Skill

- Users feel you are making their problem into a big deal
- Vendors focus too much on features
- Executives think you are single subject focused

### When applying a Leadership Skill

- Users think you have no idea what they are talking about
- Peer Managers feel like you are pushing into their area
- Executives think you are ducking a tech question or treating them like they would not understand

## Habits that will derail being a Nimble Leader

As you move from Tech skills to Management skills to Leadership skills, you will not jettison skills as you move forward. You will build on them. This addition of skills will reduce some of the earlier skills (especially tech skills), but never eliminate the need to maintain or expand them.

1. Not listening before you define the needed style
2. Applying the wrong style to the wrong situation
3. Using only one style for every person or situation
4. Not knowing when to change style
5. Letting tech skill go stale
6. Stop honing your management skills
7. Think leadership skills are all you need

## Conclusion

Your company needs the right mix of workers, managers and leaders. The unique position of a Tech Manager must blend together all three. You may be a User and also a Manager. Then tack on Leadership (because no one else is more focused on this area than you).

You are the only person at your firm that might need to blend all three levels of employee. When you get it right, great things happen.

