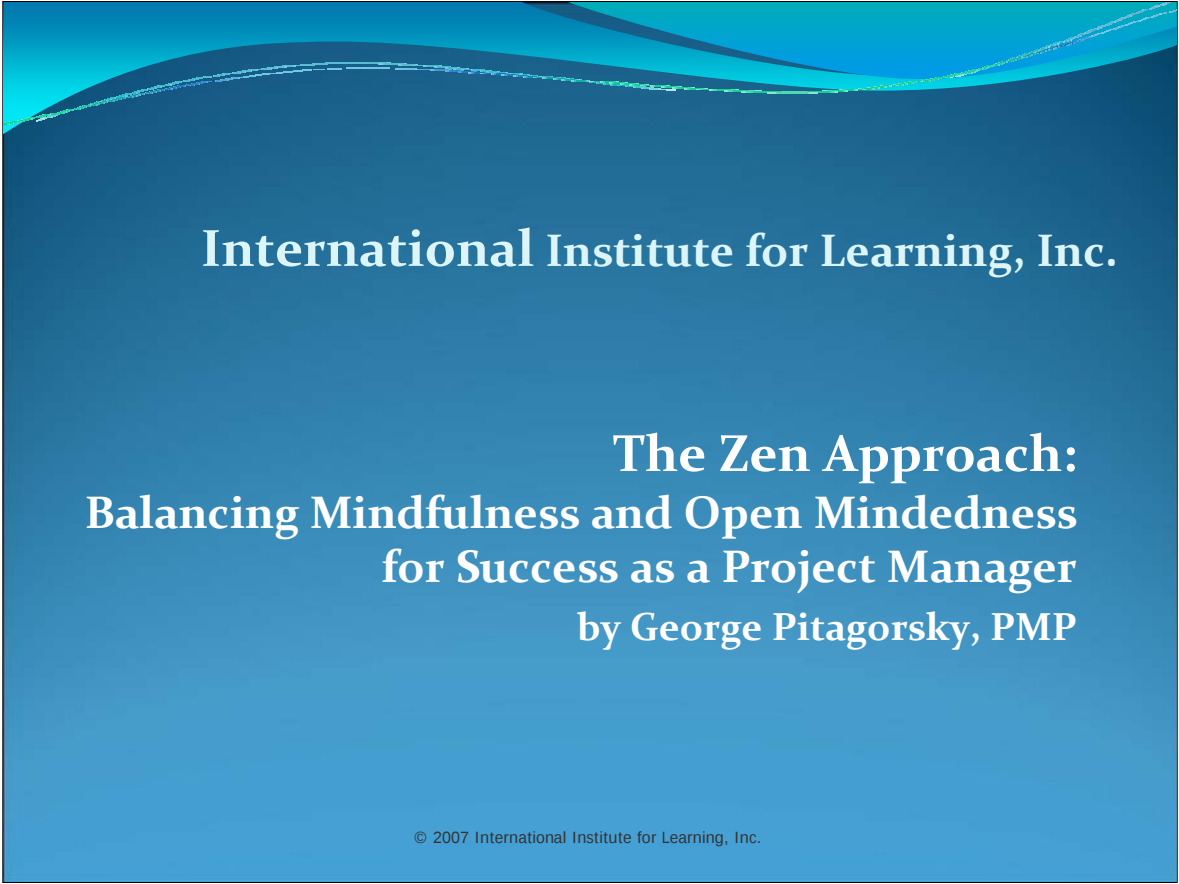




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**The Zen Approach:
Balancing Mindfulness and Open Mindedness
for Success as a Project Manager
by George Pitagorsky, PMP**

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This presentation explores the application of mindfulness and open-mindedness to managing projects.

Open minded mindfulness is the foundation for effective planning, change management, problem solving and conflict avoidance and resolution and these are the skills that enable project managers to succeed now and into the future.

Participants will learn techniques to work on their personal growth while becoming increasingly effective in managing themselves, their projects, and their careers.

Participant's Notes:

The Zen Approach to Project Management:

Working from Your Center to Balance Expectations and Performance

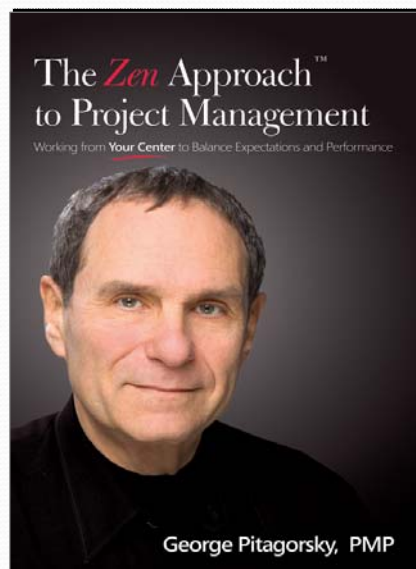
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George Pitagorsky's background

- PM and Change Management consultant and educator
- 40+ years of continuing real world experience in product development, engagement and project management
- Co-developer of IIL's Unified Project Management Methodology (UPMM™)
- Author of *PM Basics™*
- Co-developer of *Working Wisely and Conscious Living/Conscious Working* and
- Developer and director of development for IIL's core PM curriculum and numerous courses in
- 30+ years of practice and study in Yoga, Tai Chi Chuan, applied Buddhism and the integration of these into practical daily life
- Member of the Teachers Council and Board of Directors of the New York Insight Meditation Center

Participant's Notes:

Is there Unnecessary Stress?

- Unrealistic expectations?
- Unnecessary arguments?
- Win-lose attitudes?
- Emotional reactions?
- Closed mindedness?



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The Buddha's first Noble Truth says that there is stress and anxiety. The second says that it is caused by clinging to things that can't be held onto and trying to avoid the unavoidable. In short, wanting things to be different than they can be is the cause of unnecessary stress and anxiety.

Participant's Notes:

The Buddha taught that there is a level of stress and anxiety that can be removed by applying skillful means. The root cause of this unnecessary stress is attachment to wanting things to be different than they are or can be.

Is this premise true for you?

Are expectations reasonable or delusional?

Are people driven by unfounded beliefs that make them reactive instead of proactive?

Does closed mindedness create unnecessary conflict and get in the way of finding the best

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Is more time spent in debate than in reaching consensus?



“Free yourself from mental slavery.
None but ourselves can free our
mind.”

Bob Marley



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Mental slavery is conditioned thinking that leads to reactive behavior. Reactive behavior is rarely optimal in project management. Whatever our goals, clear thinking, creativity and the ability to adapt to the needs of the moment are success factors.

A wisdom approach is working to free the mind from mental slavery. When we do that the natural state is revealed and we can experience our intrinsic nature, we can self actualize.

Participant's Notes:

Let's Explore

- How is open minded mindfulness a foundation for success in managing projects?



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In this presentation and the dialogue that follows we will define and explore open mindedness and mindfulness as two interrelated foundations for successful project management.

We will take the opportunity to practice a simple but powerful method for cultivating mindfulness and concentration.

Simply take note of the physical sensation of your body.

Take note of your breathing. Immediately that brings you to the present moment.

In the next moment you may notice thoughts arising. Just note them and stay, for a moment on the body and the breath.

Now, consciously engage in the activity of the moment.

If you notice that your mind has wandered, just bring yourself back to the body and the breath. Reengage.

Try that for the rest of the session.

Participant's Notes:

Who Wants Success?

Success

“a : degree or measure of **succeeding**

b : favorable or desired outcome; *also* : the attainment of wealth, favor, or eminence”

Merriam-Webster, www.m-w.com

The key to success is an open minded approach that balances discipline and flexibility to meet the needs of the situation at hand



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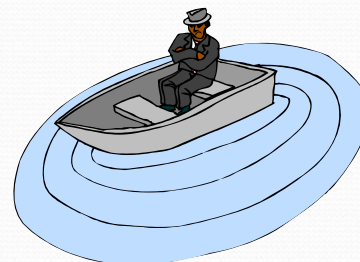
Projects are often more complex and stressful than they need to be. Far too many of them fail to meet expectations. There are too many conflicts, too much anxiety and too few moments of joy. Everything is changing. Everyone is seeking to cut costs, increase throughput and maximize quality.

The Zen approach cuts through to help us manage the complex interplay among people, time, cost and results. The effective project manager remains calm, motivates, promotes consensus and creates an understanding of wants and needs moderated by the reality that uncertainty is the only certainty. These result in a higher probability of success.

Participant's Notes:

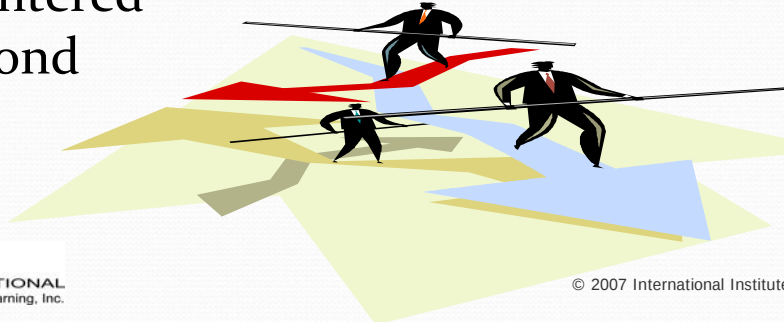
Stay Dynamically Balanced

Don't react



Get "centered"
& Respond

Dynamically Balanced



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It seems as if people forget that dynamic change is a given and they *get caught up* in it and become reactive.

Getting caught in reactivity occurs when we lose perspective. With the loss of perspective comes the loss of the ability to respond. Instead, we react. Fear, anger and other emotions drive us to act in ways that lead us away from the very thing we want.

Think about the mad rush to get a hopelessly late project back on track.

Does rushing madly help?

Does disengaging for enough time to sit back and think about what to do help?

Getting centered means "being behind the waterfall – calm, sitting behind the moment's events."

The person who can stay centered can be more effective; more likely to positively influence the outcome.

Participant's Notes:

Goals, Objectives and Priorities?

- A particular result on time and within budget
- Getting the next project done successfully
- Making more money
- Better service
- Self actualization
- Happiness - Joyfulness
 - Material
 - Spiritual
 - Loving relationships



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A key principle of project management is knowing your objectives. It's like going on a journey. If you have a sense of where you are going and when you want to get there you are likely to keep going in the right direction and make the most of your time. If you don't know where you are going you will get somewhere, but where you get may not suit you.

So what do you want? Are your wants realistic? Are they compatible with one another? Which are more important than the others? Are some contingent upon the achievement of others? For example is your happiness contingent upon making more money?

Participant's Notes:

The Decision to Break New Ground

- Can you do without the comfort of certainty?
- Can you suspend your beliefs?
- Can you rely on your intelligence and experience?



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To become non-reactive we must give up the comfort of habitual responses. We must break new ground.

Breaking new ground requires that we at least suspend, if not jettison our most dearly held beliefs in order to make sure they are worth keeping. The decision to break new ground and jump into the void of uncertainty requires courage.

The more confidence we have in our own intelligence and experience the easier the leap becomes.

Imagine how it feels to have no ground. To be in free fall without any ground below, no signs to guide you.

What are your choices?

Freak out or enjoy the trip.

Remember there is no ground so there is nothing to smash into at the end of your fall.

Participant's Notes:

Zen and Wisdom Approaches

Nothing is permanent

You can free your mind

Everything you think, say and do creates a ripple

You can't stop the flow.
But, maybe you can direct it

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That brings us to the Zen approach. This is an approach that is founded on ancient wisdom. It is as applicable today as it was 2500 years ago. It starts with the notion that you can free your mind, that you can be authentic in responding to the specific needs of the situation, as it presents itself in the moment.

Participant's Notes:

Zen



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Zen is a wisdom approach. What is a wisdom approach? It is an approach that gives us the ability to see things clearly and minimize the probability that we will be reactive and ineffective in achieving our goals and objectives.

Wisdom is the synthesis of knowledge into active, practical use.

A wise person moves through life with equanimity, unphased by the chaos surrounding her. A wise person has choices. He is not unconsciously driven and reactive. She questions even her most dearly held beliefs to seek reality.

Most of us have some degree of wisdom. The trick is to increase one's wisdom to live more effectively. What does that mean?

What is "effectively"? It is what ever you define it to be – a balance of more successful, richer, more powerful, joyous, compassionate, meaningful, etc.

The Zen approach cuts through complexity to go straight to the heart of a matter. Zen promotes knowing through inner experience. It promotes discipline from within. In the Zen way, the individual comes to fully know his or her own nature by cutting through intellectualism, cultural barriers, conditioned responses, rules and any other "extras" that get in the way of seeing the essence. One who sees the essential nature of things has wisdom. Wisdom leads naturally to compassion.

Zen is not religion, it is a practical way of living that can be applied anywhere by anyone interested in perfecting himself and his performance.

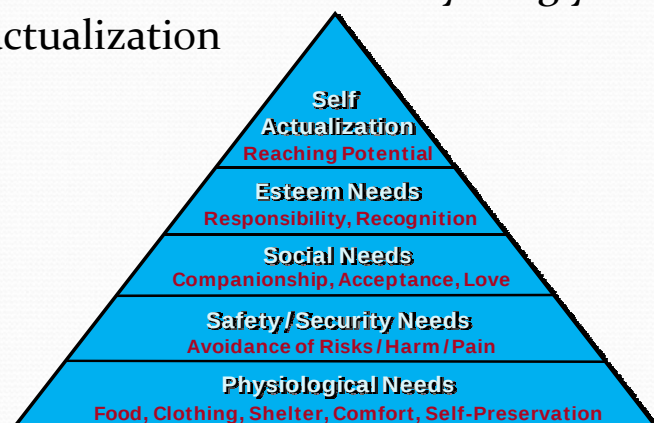
A Zen approach provides the edge that differentiates a struggling PM from one who manages projects fluidly, like an expert skier manages the mountain. The Master PM cuts through complexity and conflict like a hot knife through butter.

Participant's Notes:

Make a Zen Art of Your Projects

Outer work: Continuously perfect your work to maximize its intended effect

Inner work: Use everything you do to reach for self actualization



Abraham Maslow. Motivation and Personality: New York, NY: Harper and Brothers, 1954.

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Zen is known for its use of everyday activities as a vehicle for self awareness.

Using Your Work for Self Actualization. Using Self Actualization to Perfect Your Work

Project management can become a Zen art.

We can continuously perfect our performance and ourselves.

Work becomes a point of concentration and a field for applying mindfulness. Mindfulness leads to insight and through insight, wisdom and compassion.

Self-actualization: Personal growth and fulfillment

In keeping with Maslow's beliefs, in the 1990's unnamed psychologists split Self-Actualization to include:

Transcendence: To connect to something beyond the ego or to help others find self-fulfillment and realize their potential.

Participant's Notes:

Foundation for Success: Open Minded Mindfulness

Open Mindedness:

Question Everything

- Aware that one's own perspective is limited
- Open to different ideas, beliefs and values
 - Even one's that conflict with one's own
- Prepared to seek win-win solutions
- Discriminating while being non-judgmental

Mindfulness:

Direct experience

- Present
- Attentive
- Observant
- Aware
- Remembering to stay so



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Open minded mindfulness is the foundation for effective performance.

Moment to moment mindfulness is the capacity to see things objectively by staying in the present unencumbered by reactive behavior. It is the capacity to remember what we are doing and why we are doing it. Mindfulness seeks non-judgmental awareness via direct immediate experience of one's thoughts, feelings, physical sensations and all of the stimulate that are effecting them.

Open mindedness means being ready to question everything. When "alien" ideas confront you, open mindedness means that you respect other's perspectives, question your reaction to them, consider alternatives to your way and seek creative win-win solutions.

Mindfulness enables you to have the moment to reflect before you respond. Open mindedness enables you to respond in an effective and appropriate way

Participant's Notes:

Focused witnessing of each moment objectively to cultivate awareness, relaxation and concentration

Moment To Moment Mindfulness

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Participant's Notes:

As planning is the foundation for project success, mindfulness is the foundation of effective performance.

Being mindful means observing each moment and remembering to do so. Through mindfulness comes the ability to be in a position to act, not react. Mindfulness, if we let it, will lead to insight and wisdom.

Have you kept up the technique we mentioned earlier?:

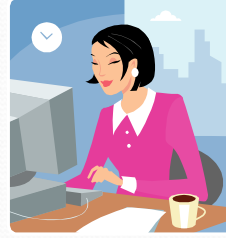
- Feel your body: your seat on the chair, feet touching ground, physical sensations
- Find your breath and simply take note of it
- Take a moment to clear your mind and relax
- Engage

If you get lost in your mind, begin again.

Awareness, Concentration and Mindfulness

- Awareness is knowing
- Mindfulness is moment to moment remembering
- Concentration is the ability to choose to focus the mind on an object

**Awareness depends on
concentration and mindfulness**



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"In his book, *The Mirror Advice: On the Presence of Awareness*, Namkai Norbu Rimpoche gives an example of a normal adult who has a cup of poison in front of him and is aware of it. He knows the danger of poison and can help others be aware of the poison by telling them not to drink from the cup. But some of these others, even though they know of the danger, don't consider it important or have doubts about it. Some may not be aware. For these it is necessary to create a law against drinking from the cup or taking the cup out of their reach, as one would do with a child. These actions can save the lives of irresponsible people, people who lack awareness. Namkhai Norbu extends the example to include the idea of mindfulness and the concentration needed to remain *present*. Assume that the adult, fully aware of the danger of the poison, forgets. He becomes distracted and loses presence. He is no longer mindful of what is in the cup. Thirsty and without thinking, he may take a sip and die."

Pitagorsky, p 21 – 22.

Participant's Notes:

Open Mindedness

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Participant's Notes:

Open Like the Sky

Are you

- **Able to see the big picture and the details?**
- **Aware of the internal and external process?**
- **Aware of the possibilities?**
- **Able to connect causes and effects?**
- **Able to question everything?**



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Able to see the big picture. Always aware of the infinite number of possibilities. Aware of the many layers of internal and external process.

Open mindedness is a prerequisite for process improvement. It is a Basic tenet of the Zen approach and the wisdom traditions in general.

Perhaps the reason that the Japanese so readily adapted quality management was their familiarity with process and systems orientation that is a natural part of their Buddhist tradition.

But japanese history is not what we are here to discuss. How openmindedness contributes to performance excellence is our focus.

The ability to see the process, to question even the most fudamental beliefs, and connect causes and effects are keys to performance improvement.

Open mindedness begins with the decision to break new ground, to do without the comfort of certainty. This decision required the courage to suspend all beliefs
Sent via BlackBerry from T-Mobile

Participant's Notes:

Open Mindedness: Perspective

- Clinging causes unnecessary suffering
- No absolutes – question everything
- Systems and Process oriented
- Objective, Analytical & Intuitive
- Service is what counts



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Mindfulness makes it possible to see things as they are.

A project manager who is centered and mindful can take on a perspective that balances the elements listed above.

The perspective must be clear, fact based and objective, based on a comprehensive coverage of all aspects of the problem space, involving the needs of all pertinent stakeholders. We must be open to change.

Perspective provides the base for effective action.

If our beliefs and views are distorted we create the very problems that we wish to avoid or eliminate.

Participant's Notes:

Clinging Causes Suffering

Catching Monkeys

- Put out a jar with a mouth just wide enough for a monkey to slip its hand in
- Place in it some tasty morsel that monkeys love
- Wait & watch the monkey slip its hand in and grab onto the morsel
- Watch the monkey struggle until it is caught
- All the monkey had to do was to let go, slip its hand out and be free



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Another Zen principle is the cause of unnecessary suffering. We impose unnecessary suffering on ourselves when we cling to things that can not be held onto or try to avoid things that are unavoidable.

How does this relate to the way some people hold onto their unattainable objectives or to beliefs that have no foundation in reality?

Have you experienced an organization continuing to pursue a strategy or project that every one knows is never going to pay off.

When it is clear that holding on is not productive, let go. Then maybe you can find a way to get what you want and can get.

Participant's Notes:

What do You and Your Organization Cling To?

- Irrational objectives?
- The desire for certainty?
- “Your” ideas and positions?

Does clinging create suffering?

What are the alternatives?

- Rationality
- Open mindedness



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Everyone seems to cling to something, sometimes. The clinging is a step beyond just wanting something. There is nothing particularly unskillful in wanting something. It is holding on to the wanting when it is objectively clear that what you want is impossible to get.

Why is that unskillful? It leads to resentment, anger, depression and other negative emotions. Letting go is the cure. With letting go comes a sense of release and with that creative energy is freed. There is a common experience that as soon as we let go what we need comes flying in.

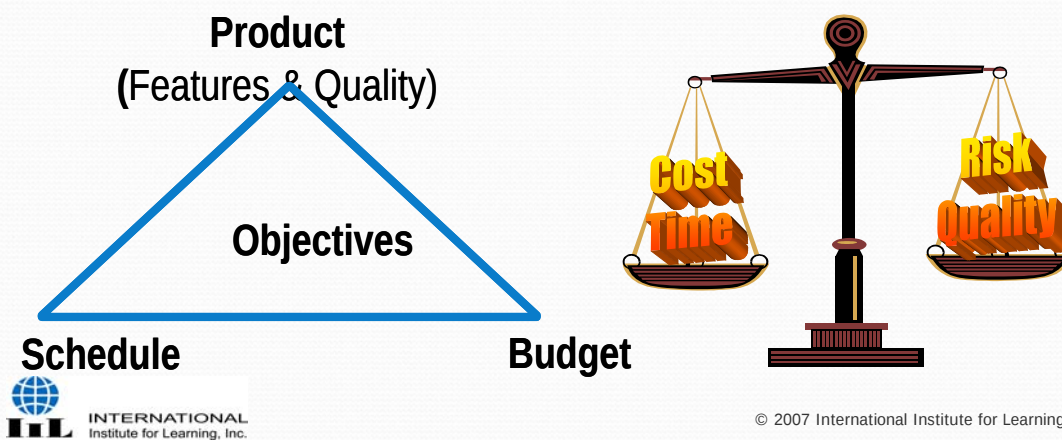
Remember the last time you tried to solve a complex problem that wouldn't cooperate. You tried and tried. Maybe it gave you a head ache. Maybe you were frustrated.

Then you let go. You went to sleep or were interrupted by some other problem. 4/26/2008 © 2004 International Institute for Learning, Inc.
maybe days later, you were in the shower or driving to work and BOOM, there was the answer.

Participant's Notes:

Irrational Objectives vs. Rational Decision Making

Schedule & Budget = f (Technique, Resources, Environment, and Product)



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In the PM context, we are often faced with the demands of project clients and sponsors for the suspension of the very rational notion that there is only so much that can be done in a particular time frame for a particular cost. Variables like the approach or technique, the available resources and their skills, the project environment and the nature of the desired product drive the time and cost. Uncertainty exists and as such even the possible may become impossible.

When we cling to a desire to get the impossible done everyone suffers unnecessarily. When we open to the realism we are in a position to optimize results and to have expectations met.

Unless you are very powerful magicians, you cannot make everything you want to happen, happen.

Participant's Notes:

Freedom and Serenity – Not Passive Acceptance

We are free of suffering when we

- Accept the things we cannot change
- Have the courage to change the things we can
- Have the wisdom to tell the difference between them



adventurehut.com/photos/serenity.jpg
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Let's **not** mistake realism with a passive acceptance of whatever happens. We can take action and that action can have an effect. We just have to remember that there are limits.

The Serenity Prayer provides some age old wisdom that clearly states that accepting things as they are does not mean being passive. When we manage in the Zen way we courageously and creatively push through obstacles to perfect our performance. At the same time we accept the fact that perfection may be unreachable. We accept the unavoidable flaws and learn from them.

Accepting things as they are right now is the only rational thing to do since we cannot change things as they are right now. We can change things in the next moment

Participant's Notes:

The Only Certainty: Uncertainty

- Everything is changing
- There is risk and uncertainty



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Some people get caught up in the unfounded belief that when they make a plan they are defining the future. These people tend to create unnecessary stress for themselves and others because they try to stick rigidly to the plan, instead of rethinking it regularly throughout the project, as reality dawns, moment to moment.

Planning takes place throughout the life of a project or program. It is an iterative refinement process that is based on the progressive elaboration and awareness of the conditions that drive the effort, cost and time it takes to get things done.

Participant's Notes:

“This is why, I think, there is a so much interest in a culturally productive way of life which, ... , has felt thoroughly at home in ‘the Void,’ and which not only feels no terror for it but rather a positive delight.

To use its own words the situation of Zen has always been —

*“Above, not a tile to cover the head;
Below, not an inch of ground for the foot.”*

Alan Watts, *The way of Zen*

What does it mean to not have a tile to cover the head; no ground?

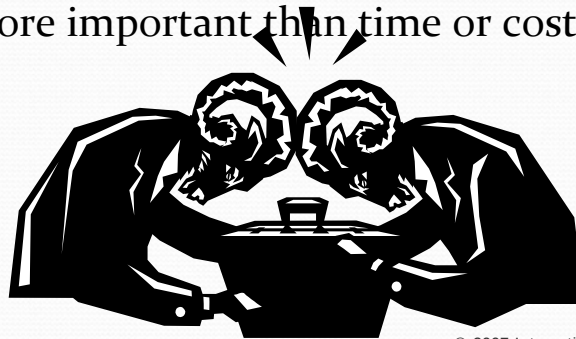
There is no protection, no foundation to rely on. Imagine again being in free fall without a ground. You can freak out or enjoy the ride. Since there is no ground, you aren't going to hit anything. We seek, through mindful awareness, to let go of our desire to control what cannot be controlled and to hold onto what cannot be held onto. We jump into the icy cold water ready to enjoy the shock and the cleansing it will bring.”

Pitagorsky, p.35

Participant's Notes:

No Absolutes: Cease to Cherish Opinions

- My design is better than your design
- A centralized PMO is essential; PMO leads to bureaucracy and a police state
- Iterative agile is better than waterfall
- Quality is more important than time or cost



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The Buddha advised his followers not to rely on beliefs based on the authority of others. The Zen way relies on personal experience to validate a set of principles and hypotheses.

Absolutist:

- This vs. that; either-or; take it or leave it
- There is one truth

Relativist:

- Dependent on the perspective, situation and setting

The Middle way

- Balance along a continuum
- Take some from here and some from there
- Situational solutions work best
- Some ways are better than others

How often do we find ongoing never ending conflict as a fact of organizational life.

Complex issues rarely have simplistic resolutions. However when we open our

minds we find that through dialogue and

analysis we can come to a resolution that fits the needs of the situation and satisfies the needs of the conflicting parties.

Participant's Notes:

Adapt to the Situation: Your Setting?

- **Process:** Well managed, rational, continuously improving – Seat of the pants – Unconscious
- **Change profile:** Slow to change – Managed change – Constant change
- **Control:** Bureaucratic – Balanced – Chaotic
- **Performance effectiveness:** High – Medium – Low
- **Knowledge transfer:** Smooth, managed knowledge transfer or not
- **Communications:** Open – Guarded – Dysfunctional
- **Relationships:** Hierarchical – Collaborative – Collegial – Professional – Contractual
- **Aesthetics:** Fun – Elegant – Passable – Miserable



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“To adapt means to bring an organism in correspondence with the reality of a situation—that is, to creatively adjust, reconcile and fit. To be adaptable is to be pliable, supple, tractable, and moldable.”

David H. Shuster

The nature of your setting impacts the way you work and manage. The setting is both the physical situation and the organization's culture within which projects are performed. Your setting's nature can be changed.

Where are you now? How does this effect how you apply PM methods to your work? How does it effect your performance?

Where would you like to be? How do you get there?

Participant's Notes:

Objectivity and Subjectivity

“Dispassionate objectivity is itself a passion, for the real and for the truth.” Abraham Maslow

- Intuition – subjective objectivity
- Analysis – objective objectivity
- Divergent and Convergent thinking
- Win-win conflict resolution



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To manage in complex systems clarity born of the coming together of experience based intuition and analysis enable the divergent and convergent thinking that is needed to solve problems, resolve conflicts, create effective plans and designs.

See things as they are.

Participant's Notes:



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system. Sociopolitical, geographic and interpersonal and intrapersonal events impact the system in ways that are often unpredictable.

[illegible]

Learning From Performance

Every result is the outcome of a process

“Learning is not compulsory ... neither is survival.”
W. Edwards Deming

How candid can you be?



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Projects must come to an end. As they do it is a best practice to look back and evaluate performance. In fact don't wait for the end. Evaluate performance regularly and with an objectivity that allows even the most embarrassing realities to be surfaced and scrutinized.

Banish fear and blaming

Remove the causes of negative events and poor performance

Strengthen and promote the causes of positive events and performance excellence

Participant's Notes:

Service People, Teams and Relationships

- Success means satisfying stakeholder needs
 - Communication
 - Conflict management
 - Respect for diversity
 - Common vision
 - Competency
- Do no harm
- Add value



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Projects are by nature service activities. They are always performed to benefit organizations, sponsors and clients while serving the needs of project performers.

Regardless of our role we can always take a compassionate service attitude. That means doing no harm and making sure that what ever we do provides the maximum benefit.

Projects are performed by people and people are by nature complex and difficult to manage. With an open mind and the mindfulness that allows us to see when the mind is closing we can cultivate the awareness that leads to behavior which will be a reflection of the perfection at the center of it all.

The more we are able to see others and ourselves as one and the same, the more we can work well in relationships. We don't have to give up our individuality and our personal interests. We can hang on to them, but always with the question of whether they are fulfilling our needs and the needs of our teams, our families, our communities and our environment.

The basic teachings regarding the way we relate to our environment and the others in it is "Do no harm. If you can, make sure what you do adds value and enhances well being."

Participant's Notes:

The message is:

“Be mindful,
consciously aware,
critically analytical,
kind and compassionate,
focused like a laser,
open like the sky,
fearless in the face of reality,
self confident and humble”



Pitagorsky, The Zen Approach to Project Management, p. 13

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Participant's Notes:

Questions? Comments?



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Participant's Notes:
