

# “On Balance: 5 Strategies for Resilient Project Managers”

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## Abstract

None of us remembers our first steps. Walking is something we learn and continue to do subconsciously without being aware that we actually walk forward by going into and out of balance...until we fall. When children learn to walk, they don't really worry about falling: if they do, they usually pick themselves up and simply try again. At that age, consciousness is not fully developed and they're not afraid of falling or losing their balance. This learning process, based on trial and error, imitation, rehearsal and practice, is at the base of all learning and growth and, in the specific case of learning to walk, even marked the beginning of our evolution: as Darwin stated, our progenitors were transformed into human beings by the ability to stand firmly on their feet and walk.

However if unconsciousness allows us to learn to walk, in adulthood it is consciousness that allows us to balance the intricacies of our personal and professional life, successfully counteracting potentially stressful experiences in today's fast paced and highly uncertain world. This conscious balancing act, both physical and psychological, may be considered a naturally restorative learning process for equipoise and equanimity, which Albert Einstein brilliantly summarized in the famous quotation: “*Life is like riding a bicycle. To keep your balance you must keep moving*”.

Drawing on scientific evidence, psychology and direct experience of the project environment, this paper will explore the meaning of balance in projects and in our life. It proposes 5 practical strategies specifically targeted to Project Managers and designed to nurture resilience, sustain well-being and achieve inner balance. Each strategy will be presented using interesting metaphors as well as practical examples, and will provide key elements to identify which strategy or strategies might best be applied in one's personal and professional life.

## Balance defined

The online etymology dictionary states that the word “*balance*” comes from the late Latin *bilanx*, meaning “scale”. The meaning of “*physical equipoise*” comes much later, in the XVII century, when the verb “*to balance*” also acquired the meaning of “*to bring or keep in equilibrium*”. The concept of equilibrium is strongly linked to that of balance: its Latin root is a word composed of *aequus* (equal) and *libra*, the older Latin word for scale. Strangely enough the use of the word balance to mean the ability to keep one's equilibrium seems to be quite modern, at least in the English language. Two current idioms are particularly relevant when applied to the project environment, and the role of the Project Manager in particular:

- “*in the balance*” describes an undetermined and often critical position;
- “*on balance*” describes the act of taking everything into consideration.

In the paragraph where the PMBOK® Guide refers to the Responsibilities and Competences of the Project Manager the word balance appears twice:

- “*Personal effectiveness encompasses attitudes, core personality characteristics, and leadership which provides the ability to guide the project team while achieving project objectives and **balancing** the project constraints.*” (PMI®, 2013, p. 17).
- “*Effective project managers acquire a **balance** of ethical, interpersonal, and conceptual skills that helps them analyze situations and interact appropriately.*” (PMI®, 2013, p. 17).

Balance seems to be at the core of Project Managers' hard and soft skills and a competence required throughout the project, for instance when defining the appropriate project management practice to apply to a specific project and/or organization, and when using schedule compression techniques and/or defining the strategy mix for risk responses. Personal balance is certainly required when dealing with conflicts and issues, during negotiation and when faced with ethical dilemmas.

For the purpose of this paper we will define balance as an adaptive or meta-competence. A meta-competence is described as “*that which allows someone to locate a particular competence within a larger framework of understanding.*” (Fleming, 1991, p. 9). It usually refers to the ability to read a new situation and adapt/apply appropriate competences. Therefore a meta-competence can be applied only when other competences are already framed and can be used to create a logical connection between them. Usually meta-competences are considered higher order abilities which have to do with being able to learn, adapt, anticipate and deal with uncertainty and incomplete evidence, asking the right questions, and developing the means to resolve problems. Among the most common meta-competences we find such skills as “*learning to learn*” or “*thinking outside the box.*”

We will argue that “balance” thus defined is a core element of the Project Manager’s profile and we will explore its application in five strategies designed to nurture resilience and well-being.

## **The role of balance in our evolution**

Lucy lived about 3.2 million years ago, but she still is one of the best known hominids in the world. Unearthed in 1974, she was named after “*Lucy in the Sky with Diamonds*”, the Beatles song playing on the radio when anthropologist Donald Johanson and his team were celebrating her discovery. Although there are several conflicting theories about Lucy and her bipedalism, she has become a symbol of our evolution and she embodies the importance of standing and walking upright. Bipedalism (walking on two legs) has traditionally been regarded as the fundamental adaptation that sets hominids apart from other primates. Other distinctive aspects are the size of the brain and the ability to speak. Recent studies connect the physical and physiological changes required to walk upright to the development of language and the growth of the brain: “*The hominid lineage has undergone a remarkable series of physiological adaptations involving skeletal modifications to support upright posture, development of an opposing thumb, changes in the birth process, loss of hair adaptation of the gastrointestinal tract, increased innervation of the intercostal muscles, loss of pronounced canine teeth, bending of the vocal tract, refinement of the facial musculature, freeing of the vocal folds, and sharpening of the chin. Each of these adaptations plays a role in supporting language*” (MacWhinney, 2005, p. 384).

Bearing in mind that species change over long periods of time and only when these changes prove to be advantageous, standing and walking upright certainly opened new horizons of physical and cognitive possibilities for our ancestors, who had to find new ways to represent space and distance but could finally use their hands to manipulate tools and objects, and their arms and torsos to swing and throw with greater strength. Hands could also be used for gestures, facilitating communication and social interaction. Increased cranial capacity, a primitive form of social life and new mate selection criteria led to the development of more complex tools and hunting strategies, as well as communication and social skills which characterize the hominid line we now call Homo Sapiens. However a vertical spine is somewhat less efficient than a horizontal one and leads to several balance problems: “*Even with much anatomical modification, some features of the human skeleton remain poorly adapted to bipedalism, leading to negative implications prevalent in humans today. The lower back and knee joints are plagued by osteological malfunction, lower back pain being a leading cause of lost working days, because the joints support more weight. Arthritis has been a problem since hominids became bipedal: scientists have discovered its traces in the vertebrae of prehistoric hunter-gatherers. Physical constraints have made it difficult to modify the joints for further stability while maintaining efficiency of locomotion*”. (Human skeletal changes due to bipedalism, 2013).

## **Physical balance**

Newton's first law of motion is often stated as “*An object at rest stays at rest and an object in motion stays in motion with the same speed and in the same direction unless acted upon by an unbalanced force*”. When a person is standing there are two balanced forces acting simultaneously: the force of gravity exerts a downward force while the floor uses an upward force. When these two forces are of equal magnitude and in opposite directions, they balance each other and the person is at equilibrium or what we perceive as stability. Newton’s third law (and balance) comes into play when we start walking: “*the mutual actions of two bodies upon each other are always equal, and directed to contrary parts*”. When we walk, our feet push against the ground (action force) and the ground in turn pushes the foot forward (reaction force). In doing so we actually allow ourselves to go out of balance on one side, only to catch ourselves and return to balance, starting the process all over again: we walk forward by going into and out of balance. Walking is something we learn to do subconsciously and, if we never allow ourselves to become out of balance, we will never learn to walk. Children don’t worry about losing their balance, indeed they often enjoy it: it’s

part of the learning process and it is only when we become consciously aware of falling that we begin to fear losing our balance and, incidentally, risk limiting our experiences and our growth.

Learning to walk is one of the most important achievements in our early life, as it's a crucial step towards independence and growth: as Spinoza, the XVII philosopher, wrote *“whatever increases, decreases, limits or extends the body’s power of action, increases, decreases, limits or extends the mind’s power of action. And whatever increases, decreases, limits or extend the mind’s power of action, also increases, decreases, limits or extends the body’s power of action”*. Obviously, children as well as adults must catch themselves before they fall too far and hurt themselves. Even small physical traumas and/or traumatic experiences may stop the learning process and change the way we relate towards a specific situation. *“When a new behavioral sequence is learned, images associated with the learning experience (positive or negative) may be stored simultaneously. When the same behavioral sequence is repeated those images are also recalled.”* (Rothschild, 2000, p. 52).

Stress is one of the most common consequences of this mechanism. When in 1936 H. Seyle wrote his first article on the physiological reaction to “nocuous agents” (harmful factors), he did not foresee the amount of research, studies and in general the long lasting interest that would grow around what we now call “stress”. A common word in our vocabulary, stress is an integral part of our daily life, as much as breathing, eating, working... Not all stress is bad. In fact, stress is essential to life. Linked to the *“fight or flight response”*, stress enabled our ancestors to survive in an unforgiving environment, just as today it helps us successfully confront all potentially stressful experiences. While on the one hand stress management resources can be easily found everywhere, on the other hand we can just as easily recognize a large number of stressed project managers in almost all organizations, business sectors and at all levels of experience.

*“Muscular tension”* is one of the first sign of dis-stress (the negative stress): *“muscle contraction is not a bad thing; it is necessary to be able to hold ourselves up and for all the movements we make throughout the day. (...) Certainly there are times when the degree of chronic muscle tension becomes discomforting”* (Rothschild, 2000, p. 135). The *“emergency response”* to real or perceived dangers should not become a way of life and although muscular tension is not the only symptom of stress, it is particularly relevant for our physical balance: *“We are not reptiles, but without access to our reptilian and mammalian heritage, we are not able to be fully human. The fullness of our humanity lies in integrating the function of our triune brain. (...) It is important to understand that the more primitive portions of our brain are not exclusively survival-oriented (just as our modern brain is not exclusively cognitive). They carry vital information about who we are. The instincts not only tell us when to fight, run or freeze, they tell us that we belong here. Our mammalian brain broadens that sense to ‘we are here’- that we belong together. Our human brain adds a sense of reflection and connection beyond the material world.”* (Levine, 1997, p. 265-266).

## **Psychological balance**

*“The first psychoanalysts, who wanted to think of themselves as scientists, considered psychoanalysis as a kind of laboratory for the study of unbalanced views; it wasn’t long before they began to believe that everyone, including themselves hadn’t merely lost their balance, they never had it. And that everyone, by nature, as it were, was in disarray, was riven with conflict. (...) They began to realize that balance – or more specifically the idea of the balanced mind – was no longer a useful picture for modern people”*. (Phillips, 2010, xiii).

Psychological balance can only be defined by negatives, namely the psychological disorders listed in the official *Diagnostic and Statistical Manual of Mental Disorders* (DSM) published by the American Psychiatric Association. The DSM is used worldwide and provides a common language and standard criteria for the classification of mental disorders. Leafing through the DSM is a peculiar experience which calls for a mixture of curiosity, calm and control to resist the natural idiosyncrasy of recognizing ourselves and/or every person we know in this or that pathology. On the other hand, even a superficial reading would be very instructive, as it would be the first step toward the best approach to psychological balance: awareness and self-awareness.

Defining awareness is not a simple task. The word itself is quite young (its first appearance dates back to 1828) and it shares a common Indo-European root with *“wary”* with the meaning of *“prudent, aware, alert”*. The simplest and most common definition is *“having knowledge or cognizance”*. If we accept that *“All doing is knowing and all knowing is doing.”* (Maturana & Varela, 1992, p. 27), the specific type of knowledge that we call awareness

becomes an integral part of our life, although its role is not often recognized as it should be: *“Attention, intention, and the subtle source of intuition all depend on awareness. To recognize the options for intention, which in turn orient our attention, requires awareness. Without awareness, there is no experience. Awareness is implicit in every experience we have. As such, awareness is the ultimate prerequisite of a life of quality.”* (Wrycza, 1997, p. 11).

The role of awareness in our professional life can be better explained if we take a closer look at one specific aspect of knowledge: tacit knowledge. Tacit knowledge is defined as *“personal knowledge embedded in individual experience and involves intangible factors such as personal beliefs, perspectives, and value systems”* (Nonaka & Takeuchi, 1995, p. viii). Tacit knowledge is directly related to practical know-how, personal competences and skills, it is the underlying concept of all the three areas of competences the PMBOK® Guide defines as necessary for effective Project Management: Knowledge, Performance and Personal (PMI®, 2013, p. 17). In a recent interview, Nonaka also stated *“I emphasize the nature of knowledge as ‘justified belief and skill.’ I consider knowledge to be a dynamic human process of justifying personal belief toward the truth.”* (Scharmer, 2000, p. 25).

Therefore, for the purpose of this paper, we could define awareness as a continuous mental process which results in having a specific knowledge. Thus “being aware” becomes central to the concept of a “comfort zone” and consequently of what we might perceive as our psychological balance. Our comfort zone is defined not only by what we actually know but also our general mental boundaries, for instance our risk appetite or our beliefs. When we are in our comfort zone, we experience a neutral state, free from anxiety, but which might however become inertia or force us to stay within a limited outlook. *“Nothing, of course, is more excessive than an habit”* (Phillips, 2010, p. 9).

In this sense, our comfort zone also marks the limits of our sense of balance and it should not become a constrained space. It should instead become the springboard for our curiosity, whose specific function is to encourage us to explore, learn and grow, expanding our knowledge, experiences and skills. And sometimes even lose our balance: *“Balance, like all fundamental things, is something that we can find, keep, lose and use; it is something we often want. Because it is ‘singularly captivating’, Mills suggests, we think it must ‘be necessarily good’. There is indeed nothing like it; but Mills thinks we should be suspicious of anything that might confine us by lulling us into a space of inattention.”*(Phillips, 2010, xii).

Physical inattention usually makes us lose balance, and mental inattention might have the same effect as excesses. On the one hand, we need to harness our thoughts to accomplish any tasks and, on the other hand, we must not close our mind to whatever is lurking at the edge of our attention and, often, outside our comfort zone. As R. W. Emerson said *“we all boil at different degrees”*: being aware of our *“boiling degree”* is normally called “self-awareness”, the last piece to add to psychological balance. When we focus our attention inward, we evaluate and compare our behavior and align it to what we know as well as our values and beliefs. Although both are personality traits, self-awareness should not be confused with self-consciousness, which refers to being excessively conscious of our appearance or manner. Self-awareness is also a form of reality check which can actually balance the negative aspects of self-consciousness, such as negative cultural or social conditioning.

It is said that at the entrance of the Temple of Apollo at Delphi the aphorism *“Know thyself”* was inscribed, which Plato has Socrates discuss in several of his Dialogues and which we consider the best way to close this section.

## **The Balancing Act**

So far we have considered certain aspects of balance and we can state that balance, as a meta-competence, is an active and continuous act that requires both control and flexibility. It requires the physical and mental abilities to contract and relax, to change and learn, to adapt to internal and external stimuli and, in this process, to lose balance to find new forms of stability. This we have called the “the balancing act”.

Philippe Petit, the high-wire artist who in 1974 walked on a rope between the Twin Towers, said: *“When you lose your balance, resist for a long time before turning yourself toward the earth. Then jump. You must not force yourself to stay steady. You must move forward.”*

Even in our busy lives, we often find it hard to resist the temptation to stop and look at some street performers and their almost magic “balancing acts”: jugglers, high-wire walking, skateboarders, ice-skaters or simply a baby

learning to walk fascinate us. In their physical efforts we perceive the fragility of balance and its temporary nature and we applaud loudly when they return to a stable position, to a form of stable order. When we appreciate the physical ability to “bounce back”, we are indeed perceiving the essence of resilience.

Resilience, as balance, is a dynamic process of behavioral adaptation, and it usually refers to the mental ability to “bounce back” when faced with any form of adversity, whether personal or professional. It also refers to the ability to find new solutions, and “*arrange whatever pieces come your way*” as Virginia Woolf described her own struggle with writing. Adapting to a changing environment and the necessity to make good of available (and often scarce) resources should be a familiar scenario for Project Managers who might also agree with Walter Benjamin, the German philosopher and essayist persecuted for his Jewish origins, who defined order as “*a balancing act of extreme precariousness.*” (Benjamin, 1999, p. 125). The role of the Project Manager is to bring order, even if temporarily, to constraints, conflicting interests, needs and requirements, dealing with the high level of uncertainty which is always connected to innovation and change, and...achieve results.

In his book *Adapt*, Tim Harford uses the evolutionary analogy to suggest a process of variation and selection to deal with the increasing complexity of the marketplace and the need for innovation. The analogy however implies that forethought and planning are no longer enough for good management: “*in a complex, changeable world, the process of trial and error is essential. That is true whether we harness it consciously or simply allow ourselves to be tossed around by results*” (Harford, 2011, p. 18). Consciously harnessing the trial and error process is not only an intrinsic part of the plan-do-check-act approach and at the base of progressive elaboration, it is also a part of the SECI model, Nonaka’s renowned model for knowledge creation. Recent research has shown that a fuller understanding of knowledge management practices might strongly influence project success (Reich & Wee, 2006, p. 12). Other studies have indicated a correlation between the type of project and the knowledge environment required to achieve the desired results (Kolskinen, 2004 p. 17). Finally, projects have also been considered a consistent and organized effort to fill the so-called “knowledge gap” (existing knowledge vs. target knowledge) in the development and implementation of new technologies (Regev, Shtub, Ben-Haim, 2006, p. 17). The role of individuals is and remains foremost in project and knowledge management: “*In our dynamic theory of organizational knowledge creation, knowhow is acquired mainly in socialization, know why is in externalization and combination, and understanding is achieved after internalization. Through one cycle of the knowledge spiral, we truly understand. We view knowledge as a dynamic human process of justifying personal belief toward the truth. The complete cycle across four modes is a transcendental process in which individual knowledge becomes group, organizational, and inter organizational knowledge, and then back to the individual.*” (Scharmer, 2000, p. 31). A systemic approach to project management would naturally include knowledge management as a means to manage complexity and exploit uncertainty, both significant aspects of today’s project environment.

We have seen that the ability to lose and regain balance to walk on two legs is a significant step in the evolution of our species as well as our personal development. Children’s lack of fear of falling and their natural ability to “bounce back” needs, with time, to become a conscious effort to balance the intricacies of our personal and professional life. This we have called a meta-competence: the skill to perform a “balancing act” in different contexts. The conscious balancing act can, in this sense, be seen as a naturally restorative learning process for equipoise and equanimity, of which resilience is an integral part. Resilience, like walking, is a skill and it can also be learned. The following five strategies are designed to help build balance and resilience in our professional and personal life. However, these five strategies should not be considered an exhaustive or exclusive path to achieve balance: developing resilience in particular is a very personal journey and a strategy that works for one person might not work for another. Cultural difference might also come into play and Project Managers might find they prefer one strategy over the others or even use variations of them. The five strategies, and the metaphor that accompany them, intend to stimulate personal awareness which, if applied to the project environment, will sustain and enrich the profile of Project Managers.

## **5 Strategies for Resilient Project Managers**

### **1<sup>st</sup> Strategy: Lessons from Sherlock Holmes: the power of discernment**

*“From a drop of water, said the writer, a logician could infer the possibility of an Atlantic or a Niagara without having seen or heard of one or the other. So all life is a great chain, the nature of which is known whenever we are*

*shown a single link of it. (...) Let the enquirer begin by mastering more elementary problems. Let him, on meeting a fellow-mortal, learn at a glance to distinguish the history of the man, and the trade or profession to which he belongs. Puerile as such exercise may seem, it sharpens the faculties of observation, and teaches one where to look and what to look for. By a man's fingernails, by his coat-sleeve, by his foot, by his trouser knees, by the callosities of his forefinger and thumb, by his expression, by his shirt-cuffs – by each of these things a man's calling is plainly revealed. That all united should fail to enlighten the competent enquirer in any case is almost inconceivable".* (Doyle, 1987, p. 13).

"*The difference that makes the difference*" is probably the most quoted and argued definition by Gregory Bateson, anthropologist, social scientist, linguist and in general a very ebullient mind. In his research, Bateson also relied on "*hunches*" that derived from other fields of studies, leading him to the more precise formulation: "*As I see it, the advances on scientific thought come from a combination of loose and strict thinking and this combination is the most precious tool of science.*" (Bateson, 1972, p. 75).

The presence of "context makers", i.e. sources of information that allow us to classify the different context, as well as recognize patterns and "*punctuating events*", all participate in what we shall call the "power of discernment" or our ability to capture the larger picture from a "weak signal" and represent it. "*Pattern recognition is a process to identify the particular feature or distinction that is the most important for achieving a particular goal or result*" (Dilts, 1998, p. 73). For instance, Project Management good practices are a form of pattern elicited by a process of progressive discernment. In this paper we will concentrate on the first step and the skills embodied by Sherlock Holmes: in-depth observation and "connecting the dots" of our observations.

In this strategy, observing is a process of gathering and selecting "clues". The first step is holding our judgment, questioning our own perceptions and exploring them by experimenting with multiple perspectives (for instance "*in his/her shoes*" and/or from the standpoint of an uninvolved observer). The next step is to identify the "*difference that makes the difference*" by a process of subtraction which balances our own viewpoint (which includes our experiences) and the other perspectives to separate the essential from, in Sherlock Holmes' words, the "*commonplace*". The last step is connecting the dots, creating a new pattern which will enable us to act successfully in a new context. Mental mapping is one of the tools often used to connect the dots, allowing us to represent the complexity of our experience. Semantic mapping is also particularly interesting to represent the larger picture.

In his book "Thinking slow and fast", the Nobel prize Daniel Kahneman warns us about the importance of staying open to new stimuli: "*A capacity for surprise is an essential aspect of our mental life, and surprise itself is the most sensitive indication of how we understand our world and what we expect from it*". (*ibid.*, 2011, p. 71). The process of discerning and connecting the dots allows us to open ourselves to new ideas and situations, responding adequately to "surprises". Balance is maintained by keeping opposite forces in a state of equilibrium, and while we cannot expect never to fall or make a mistake, we can build our resilience on more solid ground by discernment.

As Sherlock Holmes said to Dr. Watson, who doubted the validity of his theories, "*they are really extremely practical, so practical that I depend upon them for my bread and cheese.*" (Doyle, 1987, p. 13). Although Project Managers might not expect to make their living out of detection, there are several occasions when they might find it useful to supplement project management tools and techniques with the power of discernment. The Collect Requirements process, as outlined in the PMBOK® Guide, is such an instance, as well as Manage Stakeholder Engagement and all the situations when the Project Manager is called to negotiate or mediate conflict. The process we described as "*power of discernment*" could also be used for modeling positive behavior in mentoring and coaching activities.

## **2<sup>nd</sup> Strategy: Lessons from Alice: the gift of curiosity**

*"Alice laughed. 'There's no use trying,' she said: 'one can't believe impossible things'. 'I daresay you haven't had much practice,'" said the Queen. 'When I was your age, I always did it for half-an-hour a day. Why, sometimes I've believed as many as six impossible things before breakfast!'"* (Carroll, 1908, p. 101).

In a previous work, following on Alice's footsteps, curiosity was described as "*'embedded' in our brain and its specific function is to move us to explore, learn and grow, expanding our knowledge, experiences and skills.*" (Meloni, 2011, p. 2). The nature of curiosity itself balances the "negative bias" (also known as *fight or flee* reaction) which keeps us alert to potential threats and tells us to react quickly to them.

Although a risk is officially defined as an “*uncertain event or condition that, if it occurs, has a positive or negative effect on a project’s objectives*” (PMI, 2012, p. 310), the amount of attention devoted to threats still exceeds that given to opportunities. The evolutionary design of our brain is partially responsible for our alertness to danger. However “*worrisome thought consumes the limited amount of working brain power at our disposal*” (Kashdan, 2009, p. 181) and fear is a bad advisor, it narrows our mind, kills curiosity and with it the willingness to explore the unknown. Concentrating on threats may actually prevent us from managing risk effectively. Focusing on opportunities, on the other hand, creates the optimal state to trigger curiosity and creative thinking. Balancing and tuning out threats and opportunity through risk management processes helps our brain to remain open and receptive, defusing the negative bias. Far more powerful than any brainstorming techniques, curiosity helps us overcome the bias of risk attitudes and risk tolerance and, most importantly, risk appetite. In Project Risk Management, curiosity finds its best application, balancing its two apparently contrasting traits: openness to novelty and orderliness. Without a “*taste for novelty*”, discrepancies and new stimuli would be disregarded. Without a desire for orderliness, there would not be the need to process and retain new information. In projects, “*uncertainty matters*” in many different ways and discovering curiosity among the strategies for resilient Project Managers should come as no surprise. “*I wonder...*,” Alice would say when faced with the unknown, all the while paying careful attention to her surroundings, exploring discrepancies and balancing them against her own cognitive map. Her questioning is a perfect example of the cognitive process underlying curiosity: defined as “*the heart of resilience*”, curiosity is at work whenever we face novelty, it motivates us to move outside familiar grounds and it helps us to embrace and exploit uncertainty and learn from it.

### **3<sup>rd</sup> Strategy: Lessons from Peter Pan: the journey of awareness**

*“If he thought at all, but I don’t believe he ever thought, it was that he and his shadow, when brought near each other would join like drops of water, and when they did not he was appalled. He tried to stick it on with soap from the bathroom, but that also failed. A shudder passed through Peter, and he sat on the floor and cried. (...) Then Wendy saw the shadow on the floor, looking so draggled, and she was so frightfully sorry for Peter. ‘How awful!’ she said but she could not help smiling when she saw that he had been trying to stick it on with soap. How exactly like a boy! Fortunately she knew exactly what to do ‘It must be sewn on’ she said, just a little patronizing”.* (Barrie, 1995, p. 24-26)

One of the most fascinating aspect of Jungian psychology is the concept of archetypes. Archetypes are universal “*instinctive threads*” we inherit from the collective unconscious, which represents all the knowledge and experiences we share as a species. The number of archetypes is limitless but Jung identified three which are particularly relevant for this paper: the persona, the shadow and the self. The persona is the “*masks*” we present to the world: we wear different ones according to the situation and people around us. The shadow is the unconscious aspects of our personality, which we don’t recognize or we prefer to hide. The self represents the unification of the unconsciousness and consciousness of an individual. The creation of the self occurs through a process known as individuation, through which the various aspects of personality are integrated. It must be remember that in Jung’s psychology, the ego is the center of consciousness, whereas the Self is the center of the total personality, which includes consciousness, the unconscious, and the ego.

As Jung wrote “*everyone carries a shadow and the less it is embodied in the individual’s conscious life, the blacker and denser it is*”. (Jung, 1975, p. 131). It is however also a source of creativity and it often has a protective role. An important step in the process to achieve our psychological wholeness (self) is encountering and assimilating our shadow. We meet our shadow when, beneath the masks of our persona, we perceive a lack of meaning and an emptiness. The shadow personifies everything we refuse to acknowledge about ourselves and the process might be long and difficult. In the process we also run the risk of merging with the shadow, the dark side of our personality. However, by knowing our shadow we come to understand our dualities and, balancing them, we fulfill our potential and reach maturity. In her extensive work on archetype, Carol Pearson has created a framework to guide us in the journey towards wholeness. In her “*Awakening the heroes within*” she identifies twelve archetypes that represent different stages of our development. Each archetype is described in terms of its strength, its role in our life and its shadow. One or more archetype might be “*active*” in our life at the same time, but they usually mark a stage of our life journey: “*the hero journey is a spiral, so you may revisit these stages at different times in your life and different stages of sophistication*” (Person & Marr, 2002, p. 5).

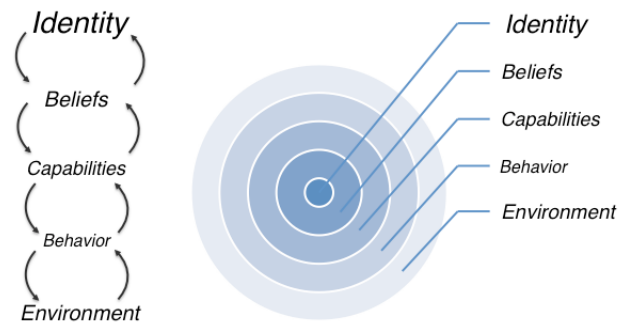
The archetypal approach helps Project Managers channel their unique strengths and become more effective and

inspiring leaders. Although archetypes are mainly a self-awareness tool, the archetypal approach can also be applied to understand the organizational and team culture in all those project management processes which require an active involvement of stakeholders.

#### 4<sup>th</sup> Strategy: Lessons from Mary Poppins: the magic of personal alignment

*“Nothing in it did you say”? And with that she took from the empty bag a starched white apron and tied it round her waist. Next she unpacked a large cake of Sunlight Soap, a toothbrush, a packer of hairpins, a bottle of scent, a small folding armchair and a box of throat lozenges. (...) From the carpetbag she took out seven flannel nightgowns, four cotton ones, a pair of boots, a set of dominos, two bathing caps and a postcard album. Last of all came a folding camp-bedstead with blankets and eiderdown complete.” (Travers, 1998, pp. 16-18)*

Balance and resilience are deeply connected with our sense of self and inner alignment. Based on Bertrand Russell’s and Gregory Bateson’s works, Robert Dilts and Todd Epstein have created a powerful yet intuitive model to guide us in understanding our experiences and to keep us aligned and, at times, to regain balance. Generally called Logical Levels, the model outlines *“an internal hierarchy in which each level is progressively more psychologically encompassing and impactful”* (Dilts & Epstein, 1991, p. 23). The Logical Levels provides a structured way of understanding the dynamics of any system, from our personality to all aspects of our personal and professional life. Very much like Mary Poppins’ carpetbag, the Logical Levels help us to recognize and track the most important elements of our life, particularly when we are facing a problem. The five levels represent a hierarchy of experiences where *“the effect of each level is to organize and control the information on the level below it. Changing something on an upper level would necessarily change things on the lower levels; changing something on a lower level could but would not necessarily affect the upper levels.”* (ibid., p. 26).



**Exhibit 1 - Two modes of representing Logical Levels**

We can use the model to recognize how the various levels interact and how they relate to our life when facing a problem and when we feel “unbalanced”. *“Spit-spot”*, as Mary Poppins would say, the model helps us to recognize at which level a problem is occurring, within us or around us. When facing any type of conflict during projects it helps us to organize and keep track of the often large amount of information that might clutter the issue. It is particularly valuable for multi-cultural teams, where different beliefs might easily lead to misunderstanding and a high level of conflict. The model offers a framework to think and act *“glocally”*, approaching culture diversity as the team’s *“pool of common knowledge”*. Finally, most leadership models include creating and maintaining alignment as an essential part of the leader role. If creating alignment among a team requires personal awareness and balance; to maintain it requires resilience and the ability to reestablish meaningful links in complex environments.

#### 5<sup>th</sup> Strategy: Lessons from Merlin: the achievement of mastery

*“By the way, Wart,’ added the magician, stopping in the middle of his spell, ‘there is one thing I ought to tell you. This is the last time I shall be able to turn you into anything. All the magic for that kind of thing has been used up, and this will be the end of your education. (...) Do you think you have learned anything?’ ‘I have learned and been happy’”.* (White, 1971, p. 255).

One intrinsic aspect of balance is movement or change. It’s only when the action and reaction forces differ that we lose balance. It’s when we are faced with change that we need to adapt.



*“The ability to adapt requires a sense of security, an inner confidence that the cost of failure is a cost we will be able to bear. (...) Whatever its source, we need the willingness to risk failure. Without it, we will never truly succeed.”* (Harford, 2011, p. 262). That “inner confidence” is what we call mastery, the full command and understanding of a subject and/or skills. To gain mastery we must be willing or at least allow ourselves to make mistakes and...we don't like to make mistakes. This is where balance and resilience come in. Research (Brown, 2010, p. 64) has shown some factors that are common to resilient people:

- They are resourceful and have good problem-solving skills;
- They are more likely to seek help;
- They hold the belief that they can do something that will help manage their feelings and cope;
- They are connected with others, such as family and friends.”

Other studies also highlight the importance of having “*areas of competence and perceived efficacy valued by self or society.*” (Masten, Best & Garmezzy 1990, p. 12). These are usually referred to as “protective factors” and they form an adaptive system which allows us to show the necessary competence even in potentially threatening situations. It is important to recognize protective factors in our professional and personal life. At times we develop habits and behaviors which have a positive and even protective intention but might become harmful or not suitable to the new context (one common example is all forms of mild compulsion). One simple strategy is to recognize the positive intention behind the behavior and find new ways to fulfill it.

Another important aspect is to recognize our strengths on the one hand and continue to learn on the other. The possibility of trial and error allows us to follow a process of creative adjustment usually associated with “*learning by doing*”. Nonaka places this mode of learning as the last step in his spiral of knowledge and calls it “internalization”, which requires “*a private space for self-refinement*”. It is difficult to imagine having this physical and temporal space in the fast-paced and often constrained world of projects, however their innovative and/or unique characteristics inevitably challenge Project Managers to acquire new knowledge and skills. Research has shown that time pressure in particular is a driving force behind efforts: “*Like jugglers with several balls in the air, you cannot afford to slow down, the rate at which material decays in memory forces the pace, driving you to refresh and rehearse information before it's lost. Any task that requires you to keep several ideas in mind at the same time has the same hurried character*”. (Kahneman, 2011, p. 41). Taking advantage of it will transform a potential constraint into a “*space where we are free to act and create. (...) Constraints promote awareness. They address, they contain, they create. They “force” us to concentrate, to be alert, to be aware of what is going on. In these conditions we are always ready to be proactive, to intercept and catch all new opportunities that may raise and adjust our behavior according to what's happening around us, in order to take the better decision, ‘here and now’.*” (Ruffa & Setti, 2011, p. 7). The trial and error process and learning by doing will in time lead us to heart of mastery, when our new skill becomes mostly unconscious and no longer questioned, and we can transfer it from one context to another. This second level of learning is usually called meta-learning or learning to learn which occurs when “*we can afford to sink those sorts of knowledge which continue to be true regardless of changes in the environment, but we must maintain in an accessible place all those controls of behaviour which must be modified for every instance.*” (Bateson, 1972, p. 142).

If and when we find the time and place to devote to self-learning, one common complaint is not being able to stop our mind thinking and worrying. Negative self-talk is especially harmful for our inner balance and weakens our resilience. Another simple but efficient strategy is increasing awareness of the “language of limitation” we use, words by which we limit our world, such as “*I can't*”, “*I mustn't*” “*I have to*”, “*Never*”, “*Always*”. Mentally substituting those language patterns with positive, active language sustains our inner balance and our learning. The same strategy might be applied when mentoring others, as well as creating powerful messages.

Merlin, who freely moved between past, present and future, at this point would probably say “*here we are, or were...*”. We start our search for balance with our first wobbling steps and we never stop, losing and regaining our balance and standing up again after many different types of fall. This is why it is important to recognize every achievement, small and big alike. It is said that Christopher Columbus, when he returned to Europe after discovering America, was also faced with critics who belittled his accomplishment. One evening he challenged some of those critics to make an egg stand on its end. They all tried but none succeeded and all said that it could not be done. Then Columbus took the egg and very gently struck its small end upon the table so as to break the shell just enough that it stood upright. “*Gentlemen,*” Columbus said, “*you said it was impossible but it's the simplest thing in the world. Anybody can do it... after he has been shown how.*” In 1839 Nikola Tesla, the archetypal “*mad scientist*”, created a

device known as the Egg of Columbus to demonstrate the principle of the rotating magnetic field model and the induction motor. Bicycles are kept in balance on the same principle, which also maintains the Hubble telescope oriented in space.

### A Dedication

This paper is dedicated to Ivano, the element of balance in my life.

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