INTRODUCTION TO
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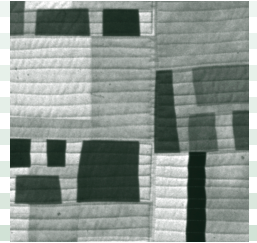# PROJECT MANAGEMENT

JENNIFER TUCKER

Overview of Psychological Type

The *Myers-Briggs Type Indicator* (MBTI) instrument is based on the work of Swiss psychologist Carl Jung, who developed one of the most comprehensive theories explaining human personality. Katharine Cook Briggs and Isabel Briggs Myers built on Jung's theory of personality types to create the MBTI assessment, a tool to make Jung's ideas practical and useful in people's lives. Today the MBTI assessment is used by millions of people worldwide to support both personal and professional development.

At the core of the theory of psychological type is the assertion that each individual has hardwired tendencies to take in information and make decisions in particular and consistent ways. The theory has been expanded into four pairs of opposite preferences, or *dichotomies,* identified by the MBTI assessment. Just as you have a natural tendency to write with your right hand or your left, type theory asserts that y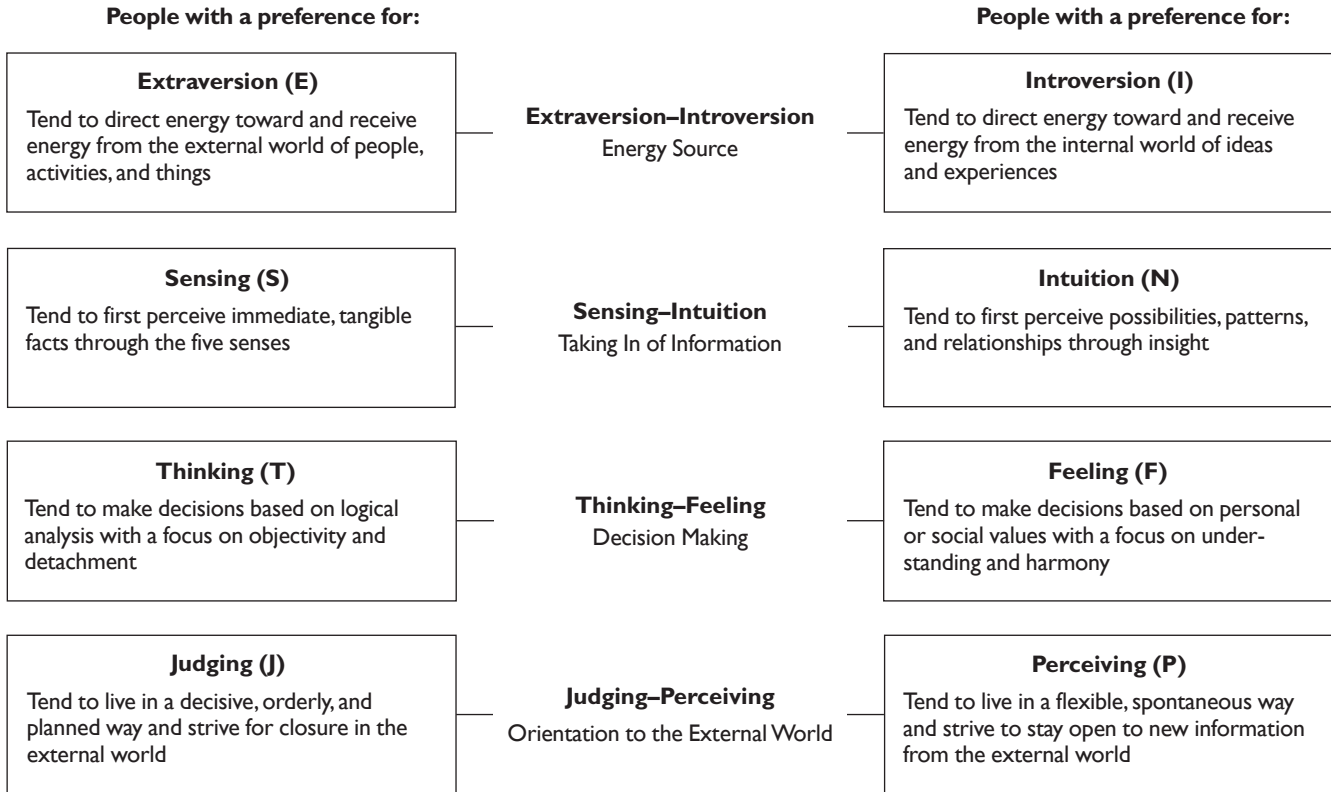ou are also inclined to use one preference in each dichotomy more naturally and readily than the other. Keep in mind, however, that everyone uses all eight of the preferences in different situations. See the chart on page 4 for a summary of the dichotomies and the preferences.

The Eight Preferences

Understanding your preferences gives you insight into what you are likely to turn to first—what is most comfortable for you. Nevertheless, that preference does not equal skill; while you may develop strengths in what you prefer to do, accessing a preference more readily does not automatically lead to expertise. The chart on page 5 provides detailed descriptions of each of the eight preferences.

Your psychological type is denoted by a four-letter code indicating your preferences, one from each of the four dichotomies: Extraversion–Introversion (E or I), Sensing–Intuition (S or N), Thinking–Feeling (T or F), and Judging–Perceiving (J or P). For example, if you prefer Introversion (I), Sensing (S), Thinking (T), and Judging (J), you are said to be the psychological type ISTJ. Your four-letter type reflects a unique, dynamic interaction of your preferences.

MBTI® Type Preferences

People with a preference for:

Extraversion (E)
Tend to direct energy toward and receive energy from the external world of people, activities, and things

Extraversion–Introversion
Energy Source

People with a preference for:

Introversion (I)
Tend to direct energy toward and receive energy from the internal world of ideas and experiences

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Sensing (S)
Tend to first perceive immediate, tangible facts through the five senses

Sensing–Intuition
Taking In of Information

Intuition (N)
Tend to first perceive possibilities, patterns, and relationships through insight

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Thinking (T)
Tend to make decisions based on logical analysis with a focus on objectivity and detachment

Thinking–Feeling
Decision Making

Feeling (F)
Tend to make decisions based on personal or social values with a focus on understanding and harmony

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Judging (J)
Tend to live in a decisive, orderly, and planned way and strive for closure in the external world

Judging–Perceiving
Orientation to the External World

Perceiving (P)
Tend to live in a flexible, spontaneous way and strive to stay open to new information from the external world

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Benefits of the MBTI® Assessment

The MBTI assessment has become the most widely used psychological instrument in the world for several reasons. First, it is relatively easy to take and understand. Additionally, it is one of the most useful, intellectually accessible, and practical tools for understanding differences in the way people see things and operate. Furthermore, the MBTI assessment reflects a fundamentally positive perspective, making it a nonthreatening way to introduce people to the concepts of psychological type.

The MBTI assessment can bring an array of benefits to teams, leaders, project managers, and individuals, as it

- Provides a framework and process that can quickly yield greater self-awareness, which can lead to better self-management
- Establishes a shared vocabulary for an important set of mental activities, allowing people to communicate more effectively about needs, expectations, and preferences

- Helps people become aware of their differences and, through the appreciation of those differences, reduce conflict
- Is applicable to a wide range of both personal and workplace functions, including leadership, team development, conflict management, decision making, problem solving, and customer service—as well as project management
- Reveals possible strengths and blind spots for both individuals and teams, in a way that remains positive and development oriented

When you use the MBTI assessment with project teams and managers, remember that it is not a test—there are no "right" or "wrong" answers or types. Furthermore, the assessment is not an indicator of abilities, likelihood of success, intelligence, or skills. People of any type can be successful in a variety of project management or project delivery roles. Therefore, the MBTI assessment should *never* be used as a tool for selecting employees, assigning tasks, or evaluating performance.

Descriptions of the Eight Preferences

Extraversion (E) "Let's talk about it"

People who prefer Extraversion

- Are energized by the external world of people, activities, and things
- Prefer to talk things through with others—an idea isn't real until it has been expressed to and discussed with others
- Tend to become drained when working alone; prefer to interact with other people
- Process information externally, thus what they say may not be the final word—or even the intended message

Introversion (I) "Let's think it through"

People who prefer Introversion

- Are energized by the internal world of ideas and experiences
- Prefer to think things through before sharing with others—an idea isn't real until it has been well considered internally
- Tend to become drained by excess interaction with others, preferring to work independently
- Process information internally, thus may not sufficiently share their thinking or decisions with others

Sensing (S) "Let's look at the facts"

People who prefer Sensing

- Prefer specific information—a precise and detailed view
- First perceive literal, concrete, and sequential details about the here and now
- Generally begin with facts and figures, which are then combined to create a larger picture
- Value past experience and a focus on what is actually known

Intuition (N) "Let's look at the possibilities"

People who prefer Intuition

- Prefer general information—a view of the big picture
- First perceive the patterns and connections in data received
- Generally begin with the possibilities and meaning underlying information and fill in the details later
- May present information using metaphor, valuing abstraction and a theoretical spin

Thinking (T) "Let's keep this objective"

People who prefer Thinking

- Prefer decision making that is objective, logical, and cause–effect oriented
- Tend to consider the problem or issue first and the impacts on people second
- Generally favor impartiality and analysis, even if it causes conflict
- Believe it's more important to be right than liked

Feeling (F) "Let's focus on the people"

People who prefer Feeling

- Prefer decision making that is subjective, empathetic, and values oriented
- Tend to consider the people involved first and the problem or issue second
- Generally prefer to be appreciative and maintain harmony
- Avoid conflict wherever possible to keep the peace

Judging (J) "Let's get to closure"

People who prefer Judging

- Make decisions with the goal of achieving closure
- Are directive and strive to maintain order in the external world
- May initially resist new information when it disrupts a plan or schedule
- May change their mind or direction after reflection and internal consideration of new information

Perceiving (P) "Let's keep our options open"

People who prefer Perceiving

- Communicate their perceptions to others, with the desire to remain open
- Are generally flexible, adaptable, and nondirective with others
- Generate options easily—the more discussion, the more options
- Often make decisions internally, meaning that sometimes those decisions aren't shared with others

Action Steps

Here are some steps that were recommended to the project manager in this case, many of which were adopted and proved successful:

- Reduce the number and length of monitoring meetings.
- Identify the project's critical path—only the interdependent tasks that define the length of the project—and manage against this path as the central focus.
- Stop trying to track the detailed progress of each individual action beyond two to three weeks down the road. Instead, keep the detailed view restricted to the near term only and then track only high-level, critical tasks at the one-, three-, and six-month marks.
- Allow project team members to self-manage their specific tasks, encouraging them to alert management to any concerns but otherwise trusting them to perform. Not all tasks require monitoring at the manager level.
- Rely more on written summary status reports than on face-to-face sessions to keep people informed about what's going on.
- Identify specific actions that will demonstrate the project's commitment to its staff members. One option is to schedule a "project holiday"—a sponsored event at which all project team members engage in a shared fun activity or team building, with the timeline pushed out one day to accommodate it. Another option is to use project meetings to publicly acknowledge personal events such as birthdays or anniversaries with the project/company and award outstanding performance with spot awards, team achievement awards, and so on. A third option is to introduce a "lunch with the project manager" program, where project team members are invited for small group sessions with the manager to share perceptions about the project from the delivery level.
- At least once a month, replace a status meeting with a more strategically focused big-picture look at the project. What patterns can be seen across the project that either support or impede success? What possibilities and opportunities lie ahead? A session devoted solely to a macro view may reveal needed actions that a look at the specifics may miss.

Case Study 2: Customer Support (ISFJ)

A large project team has been established to develop and implement centralized financial services for a range of small government agencies, each of which has been told to migrate its internal operations to the service provider. The project involves setting up the centralized systems and processes that will lead to this migration and then facilitating the migration itself.

The project team is currently very stressed, spending a great deal of time answering individual phone calls from a variety of customer groups and logging in highly detailed specifications and requests. Many of these requests demand different—and sometimes conflicting—types of customization, leading to team tension as members repeatedly push to reach closure about what they will and will not implement. They frequently talk about how hard it is to keep everyone happy. Much time on these calls is also spent smoothing the feathers of customers upset and worried about what the move to centralized services means for them.

The project team is having a hard time managing all the change requests and constant status request calls, and the actual migration has fallen behind schedule because the project has been unable to lock in standard specifications, policies, and processes. The team has not had a formal stakeholder outreach plan to date and has resisted holding meetings with customers in a public forum, because "we don't want things to get out of control in a large group, and we prefer to provide one-on-one service whenever we can."

Type Analysis

From a type perspective, the description above, combined with some other evidence, suggests that this project as a whole has an ISFJ type preference. Signals include

- Individualized stakeholder management, with a preference for one-on-one calls that can be controlled instead of public group meetings, which are perceived as chaotic
- Focus on gathering individual specifications at a highly detailed level rather than looking at trends across the different customer groups
- Interest in customer satisfaction and the desire for personalized service rather than on efficient and objective specifications and process management
- Desire for final decisions being thwarted by incoming calls, mediated by a desire to help individual customers and a fear of the conflict that might result from declaring matters settled prematurely

This team is suffering from an overemphasis on helping individual people in the moment—to the detriment of the project's schedule and overall goals. While sensitivity to customer concerns about turning their operations over to a centralized provider is a strength, the team risks project failure if it is not able to field quickly a solution that will meet the majority of customer needs.

Action Steps

Here are some steps that were recommended to the project manager in this case, many of which were adopted and proved successful:

- Conduct an internal session to review all the specifications received to date. Categorize these into "doing now," "not doing," and "maybe doing later" and then evaluate whether the decisions made to date are sufficient to field a system that will meet the majority of customer needs. If decisions to date are deemed sufficient, lock in the process and then publicize that lock-in and why the decisions meet most people's needs. If the specifications confirmed to date are insufficient, conduct targeted focus groups to fill in the details and resolve conflicting needs.
- Establish and implement a standard, electronic mechanism for accepting and tracking future feature requests and bug reports to help reduce the number of one-on-one phone calls. Publicize the specific method for turning in requests. Process the incoming requests in sessions designed to look for common themes rather than processing specific requests.
- Schedule structured user community forums on a regular basis to update customers on the status of the project, the requests that will be implemented, the ones that won't be and why, and the path for the future.
- Initiate a stakeholder outreach plan that includes mechanisms for communicating success stories, tips that bridge different customer groups, and frequently asked questions. Explore establishing a customer forum that will enable different groups to empower themselves by sharing and leveraging one another's expertise rather than always going to the centralized provider for help.
- Hold internal brown bag meetings for project team members to process their experiences with customers, share best practices, and offer one another support when dealing with difficult calls.

Case Study 3: Innovation and Client Management (ENTP)

A project team is creating a cutting-edge technology solution intended to be delivered in incremental versions, each with new enhancements. After completing an MBTI workshop, the team believes its project type is ENTP. It reports that this type seems representative of how members prefer to work: in an open, inventive environment that supports creativity and on a product that can evolve based on emerging requirements and user interaction. The team holds numerous development meetings, explores new technology solutions as they are released, and likes to maintain an active connection with user groups to keep a finger on the pulse of "what's next." The team has delivered three incremental releases of the technology to date, each with new capability, and is working hard on the fourth evolution.

The team has frequent updates with the client sponsor who commissioned the project, whose reported type is ISTJ.

A couple of months ago, the sponsor began expressing frustration with the "schedule drift" and the fact that requirements for the final product have not been locked in. Over the past two weeks, she has started canceling meetings with the team, and yesterday she called the project manager to demand a formal program review to get the project "under control and back on track."

Type Analysis

This type analysis requires the comparison of two types: the ISTJ sponsor and the ENTP project team. For the ISTJ sponsor, the inventive, evolving, incremental approach that is comfortable for the ENTP project team seems chaotic and out of control. Over time, this perception has been aggravated, as incremental releases appear to build on each other with no end in sight. From the sponsor's viewpoint, scope creep and significant increases in overall time and budget are serious risks that must be managed and mitigated. Formalizing the project review event is therefore needed to get things back under structured control. Past experience and proven results are what count to the ISTJ sponsor.

For the ENTP project team, evolution is a natural part of the process—locking in requirements in a fluid user environment may result in a system that no one will use down the road. From the team's viewpoint, delivering incremental versions on the way to a final product mitigates risk, because users become familiar with the system along the way and everyone gets a chance to learn in real time from the experience—saving time and money downstream. Adaptability and future opportunities are what count to the ENTP project team.

Both viewpoints have merit—the question is whether the two perspectives can be brought together to both enhance and balance each other.

Action Steps

Here are some steps the project manager took in this case to ease the concerns of the ISTJ project sponsor and keep the project on track:

- Prepared a matrix detailing the specific capabilities provided by the software for each of the previous three releases. By focusing on concrete past successes over time, the team was able to illustrate the logic and effectiveness of its approach in a way that met the ISTJ sponsor's needs.
- Agreed to lock in requirements for the fourth release and a formal release date for this next iteration. This satisfied the ISTJ sponsor's need for control in the near term while leaving options open for the fifth release—and possibly future releases—for the ENTP team.
- Got the sponsor to agree to sit down with the team and map out a vision for the project's future, focusing on how they will know when the full effort is completed. This involved taking a big-picture approach to the project

overall, focusing only on conceptual modules and goal-posts while also establishing sufficient criteria for judging success at the end of the project. Using past history combined with this strategic look allowed the group to determine that the project would be completed after the sixth iteration. The team agreed to formal reviews at each incremental delivery point to confirm progress toward that goal while allowing flexibility in the way each iteration was approached and managed.

This case study describes a project that was wildly successful yet could easily have been derailed due to misunderstandings and conflict rooted in type differences. The potential conflict between sponsor and project team was resolved through an understanding of type and a willingness to engage openly and honestly with one another. The same conflict—and benefits—can emerge when a project manager is assigned to a team that has a significantly different type, particularly when the manager is assigned in the middle of a project, where both processes and culture have already been established. Type does not explain everything, but it provides a solid launching platform for projects in a variety of settings and circumstances.

Case Study 4: Staff Development (INFP)

This case study considers what happens when a staff member is placed in a project management culture that does not support the individual's preferences. Mark is a customer service representative who has been very successful in his job; as a result, he has been promoted into a task management role on a project to design and implement a new customer satisfaction survey. Mark has taken the MBTI assessment and validated that his type is INFP.

Mark has been on the project for a few weeks and is struggling in his role. The rigidity of the project deadlines, the frequent meetings with other task managers to discuss task assignments, and all the forms and processes required to report on his task's progress make him feel micromanaged. He also misses the day-to-day contact with the customers. Mark's organization, which has grown significantly from its small entrepreneurial roots, has invested heavily in project management training, hoping to become more structured and metrics driven. In fact, the new customer satisfaction survey project is part of that continuing effort. Mark is starting to wonder whether the promotion was more of a curse than a gift, and he is contemplating whether the organization is a good fit for him in this new setting.

Type Analysis

In a world of mergers and acquisitions, where small organizations are bought by large ones and fast-growing start-ups must put into place policies and procedures to succeed as they expand, this case study represents an increasingly common occurrence. Often individuals who choose to work in a small or start-up organization do so because these companies offer a setting with an entrepreneurial spirit, great flexibility, a familial environment, and the opportunity to grow quickly without a lot of overhead management—generally indicative of an NTP or NFP type company. As the organization becomes successful and takes on more projects, it may become more structured and process driven to increase both efficiencies and economies of scale—generally more indicative of an STJ company. When this happens, however, the same people who chose to work in the organization may become disenchanted with the new direction and leave. This not only causes the organization to lose the knowledge of those who made it successful but also creates the burden of replacing departing people in addition to hiring new ones in the face of fast growth.

Action Steps

Here are some action steps that could be recommended to Mark:

- Seek ways to bring type strengths into the project, such as finding creative and fresh ways to simplify procedures, and introduce the customer voice into the process.
- Find a mentor or peer with whom to discuss his experiences and to help identify possible coping strategies while exploring and developing the skills required by his new role.
- Write down the reasons he was attracted to this position and the project in the first place. How do they support the values that brought him here? How might he inject those values into his daily tasks?

Here are some action steps that could be recommended to Mark's organization:

- Conduct regular check-ins with both new team members and established high performers to assess the effectiveness and perceived success of new project management programs.
- Actively question how new project management processes and structures are likely to change the culture into which they are introduced, and consider how to sustain the positive qualities that brought the organization success in the first place.
- Establish internal mentoring programs that pair new people with those who have been around for a long time, allowing for mutual learning between those who have fresh new perspectives and those who have the wisdom of past experience with the organization.