

## **Assignment of Project Team Members to Projects: Project Managers' Influence Strategies in Practice**

### **Structured Abstract**

#### **Purpose**

To investigate how project managers, influence the assignment of project team members by directly assigning or specifying who they want or by indirectly using lateral influence strategies to secure the appropriate resources. This study is part of a wider study investigating the balance between vertical and horizontal leadership in projects in which Nomination was identified as a key event contributing to balancing the leadership. It focuses specifically on the nomination or assignment event at the start of a project.

#### **Design/methodology/approach**

Based on the philosophy of critical realism, a case study approach was used to collect data through 62 semi-structured interviews conducted in Australia, Scandinavia and South Africa. These interviews were conducted with senior managers, project managers and project team members for each case. Two project team members who worked with the same project manager were interviewed to gather diverse views. The data was analysed individually by researchers from each of these locations using a coding method proposed by Miles & Huberman (2014). The researchers then jointly analysed the findings to arrive at five common themes from the research that explained how team members were assigned in practice from the cases studied.

#### **Findings**

Despite the recognized need for project managers to form their own teams, this study found that project team members were more frequently assigned by their functional managers, the HR department or external organizations than by project managers. This was mainly because project managers lacked the authority or power to secure their resources. Therefore, they had to use political skills and lateral influence strategies to help with the assignment of project team members. The study identified five lateral influencing skills adopted by project managers while assigning team members: creating an image of competence; creating coalitions; taking a gamble; waiting for the right moment; and reasoning with facts. Two of these five lateral influencing skills were not identified in previous literature on influencing skills used in organizations.

**Research limitations/implications**

Even though this study involved three diverse locations around the world the findings should not be viewed as representative of the respective continents where the cases were studied. However, this study contributes to the literature on project management, illuminating how project teams are assigned and by whom and, specifically, the role that politics and influence play in this event of the balanced leadership theory. It also identifies the types of lateral influence tactics used by project managers when assigning team members to their projects. It provides a pathway to explore the use of lateral influencing skills used by project managers beyond the assignment process.

**Practical implications**

This study will help project managers to become aware of influencing skills that they can use in practice while assigning team members to their projects. It will also highlight the importance of assigning the right resources to projects with a view to achieving balanced leadership.

**Originality/value**

This research is of value to organizations using projects to successfully deliver their strategies by assigning suitable resources to their projects.

**Keywords:**

Project Team; Team Assignment, Power, Politics, Influence.

**Category:**

Research paper

# **Assignment of Project Team Members to Projects: Project Managers' Influence Strategies in Practice**

## **Introduction**

It is important to assign and mobilise the right project team members to improve the chances of project success (Pinto & Slevin, 1987). It is also important that these resources are empowered to efficiently exploit their competencies in creating project deliveries as well as to take on leadership roles when needed (Drouin, Müller, Sankaran & Vaagaasar, 2018). Recent research has indicated that projects can be driven forward by both the project manager, i.e. the appointed leader of the project, and one or more project team members enacting leadership (Müller, Sankaran, Drouin, Vaagasaar, Bekker & Jain 2018). In other words, the leadership of the project could shift due to the situational requirements (Müller et al. 2018a). For the shifting of leadership to happen, project managers must identify the potential team member to take on leadership of a process (Müller, Zhu, Sun, Wang & Yu 2018) and then empower these members to properly oversee the process (Yu, Vaagasaar, Müller, Wang & Zhu 2018). A prerequisite for the shift in leadership is then the assignment of the most appropriate team members to projects (Müller et al. 2018 a).

Even though the importance of getting the correct composition of project teams right from the start is widely acknowledged, prior research shows that most organizations lack adequate processes and fail to put systems in place to make team composition decisions ahead of time or even merely neglect the attention required for team member selection (Mathieu et al., 2013). In some cases, the availability of competent resources could be limited resulting in assembling a suboptimal project team thus affecting the project's capability to perform. It is also widely acknowledged that in many project-based organizations suitable resources and competencies are scarce resulting in conflict among projects for specific resources (Engwall & Jerbrant, 2003; Anantatmula, 2016). Under these conditions, how are project team members assigned in practice and by whom? What do project managers do to have their preferred resources allocated to their project? These were some initial questions that prompted the authors of this article to inquire about project team member assignment in practice.

The article is structured as follows. First, it presents a review of relevant literature on staffing project teams. Second, it outlines how data was collected and coded through case studies conducted in three different continents – Australia, Europe (Scandinavia) and Africa (South Africa). Third, how some common themes were derived through the coding. Fourth, presenting the empirical material with analyses, discussions, conclusions and recommendations.

## Literature review

Over the past three years, the concept of balanced leadership (Müller, Sankaran, Drouin, Nikolova & Vaagasaar, 2015; Müller et al., 2018a) has gained increasing attention within the field of project management. This is defined as the leadership stemming from the dynamics of temporary back and forth transitions of leadership authority between the project manager (or vertical leader) and one or more project team members (horizontal leader) (Müller et al., 2018a). This is also confirmed by O'Toole et al. (2003), who suggest that projects often rely on a mix of vertical and horizontal leadership.

The phenomenon of balancing leadership has been the focal interest in a global research program that, based on 166 interviews, developed a theoretical framework to describe how balanced leadership evolves through the interaction of vertical leaders (also called person-centred leadership as exerted by project managers) and horizontal leadership (also called team-centred leadership as exerted by team members) (Müller et al., 2018a:83). The research proposed that the balanced leadership phenomenon consists of a cycle of five events. An event in this context is defined by Whitehead (2010: 73) as “a nexus of actual occasions, interrelated in some determinate fashions” in the actual world. These events are (for more detail see Müller et al., 2018a):

1. *Nomination* of project team members to the project. They are the potential candidates for enacting horizontal leadership.
2. *Identification* of possible candidates for horizontal leadership through a two-way process aiming for a fit between the characteristics of the situation and the empowered person.
3. *Empowerment* of the identified horizontal leader to enact leadership.
4. *Execution of horizontal leadership and its governance* by the vertical leader.
5. *Transition* of leadership from the team member(s) to the vertical leader or other team member(s).

For the purpose of this article the nomination event is referred to as the assignment of project team members following the term used in practice. As the nomination/assignment influences other processes that enable balancing of leadership, i.e. identification and empowerment, it is crucial to pay attention to getting ‘the right resources’ assigned to succeed with a project (Pinto & Slevin, 1987). This article contributes towards increasing the understanding of the nature of this process.

## Assigning project team members

While assignment of team members to a project starts when the project is initiated, members are also added to the team during the project. At the outset a *core team* is formed that remains with the project until its end. During the life-cycle of the project new members join and leave the team as complementary and specialist skills are required. These new members form the *component team* (Chiocchio, Kelloway & Hobbs, 2015). Often the core team is composed of representatives from functional departments involved in developing and implementing the project deliverables so that they can direct the work of the people in their departments (Englund & Graham, 1997: 92-93). They can also identify component team members as they are knowledgeable about the capability of members in the functional organization. The core team also takes on an integrative role when bringing more specialised individuals or teams at various project phases to fulfil knowledge gaps (Hoegl, Weinkauff, & Gemünden, 2004; Pinto, 2017).

Taking a temporal lens, we outline four situations in terms of putting together project teams. First, a fully staffed team at the start, i.e. when all the essential roles required to complete the task are filled by the optimal number of members. Second, the team that is staffed through a sequential logic in which members are assigned to the team over a longer period – weeks, months or even a year or two, due to constraints like inadequate funds, time or candidates, or as part of an evolutionary process where the team expands as the task evolves (Tannenbaum, Mathieu & Cohen, 2012; Pinto, 2017). This could also be due to lack of processes or systems in place to make composition decisions ahead of time in the organizations (Mathieu, Tannenbaum, Donbasch & Alliger, 2013: 533). Third, all members are selected within a short time (hours, days or weeks) as and when they are needed to perform a time-critical project task. Fourth, where selection could happen through substitution, i.e. when one or more new members are added to replace existing members who have exited the team or occasionally when the team member is found unsuitable.

While literature on team selection in general and project team selection can enable our understanding of the assignment process, one weakness with most research on team assignment is that it assumes that the entire team can be assigned simultaneously whereas, in reality, ad hoc or temporary assignment, sequential selection and substitution are not uncommon (Tannenbaum et al., 2012; Pinto, 2017). Sequential selection is also very likely in projects due to the changes in resource requirements over different phases of a project (Chiocchio et al., 2015), and replacement of members becomes necessary as intent and requirements change (Tannenbaum et al., 2012). Project members could also leave the project due to being posted to other assignments by their parent function, especially when a project is delayed, and then new members may have to be recruited to fill the gap.

## **Characteristics expected of project team members**

What characteristics are desirable when members are assigned to project teams? Appropriate knowledge and skills required for the task to be performed and processes related to performing this task, has been found important in all projects. For example, Stern (2017) explains how agile teams are often formed by bringing together subject matter experts, i.e. people recognized as having the competences, instead of just looking for resources in general. Investigating team member assignment in laboratory projects, Markaki, Sakas and Chadjipantelis, et al. (2011, p. 159) found that 92% of managers they interviewed consider technical skills to be salient. Eighty-four percent of the managers also look at what job positions the candidate had in previous projects, 'to find the right person for the job'

Beyond technical skills, cognitive and social skills are also identified as key predictors of project performance and thus preferred (Katzenbach & Smith, 2003: 115). One way to ascertain such skills, is looking for a preference for teamwork among potential team members; reviewing their biodata or resume; use of an assessment centre rating; and personality tests (McClough & Rogelberg, 2003: 56). Often technical skills and personality traits are insufficient to make an efficient project team, as one also needs team members to possess social skills and team work knowledge (Morgenson, Reider & Campion, 2005) and an ability to contribute positively to the team working climate (Burch & Anderson, 2008). It may also be that different industry sectors may look for other skills or attributes while assigning project team members.

Studying the characteristics of the members preferred by managers of technical projects, Struber and York (2007) found that it is important to ensure that 'their competence fits well with the target of the project, they are hardworking, positive to learn and develop innovation' (p. 159). In addition, Gorla and Lam (2004) suggest looking at personality types while selecting software project teams. They recommend finding team members with personalities that match the roles that team members have to perform (team leader, systems analyst, and programmer). They point out that using a Myers-Briggs Type Indicator of attributes can enable proper matching. In addition, heterogeneity in personalities between the team leader and team members, and among the team members could enable social interaction and a larger variety of views (Gorla & Lam, 2004). Buvik and Rolfsen (2015), based on their research on project teams in the construction industry, add that it is important to look for candidates with prior ties, because they know and trust one another. Prior ties help in establishing a team that is capable to work in an integrated way, create a common philosophy, and to develop clear role expectations. Therefore, looking for prior ties between team members can enable a good start up and

execution of the project. Hosseini and Akahvan (2017) developed a model for team formation in complex engineering projects, in which they used a Motivation-Opportunity-Ability framework for assigning team members.

In summary, previous relevant experience, social skills, knowledge about working in teams, motivation to work in a project, ability to learn and be innovative are also considered important characteristics besides technical skills. From the literature reviewed different contexts also seem to emphasise some additional skills or attributes specific to the context.

### **Team member assignment in practice**

Despite the importance of team composition to project performance and success, the research on assignment of project team members remains scarce. Reviewed literature however does point to a few methods such as interviews, work sample tests, job knowledge tests, working with assessment centres, in-tray exercises and group discussions methods (Markaki et al., 2011). Morgenson, Reider and Campion (2005), emphasise the importance of structured interviews, personality tests and situational judgement in selecting team members. Of these different methods, interviews were found to be the most preferred (90% respondents) while work samples are only used if needed. Assessment centres were generally not preferred (Markaki et al., 2011). With the emergence of virtual teams there also seems to be an increase in models and mathematical techniques to assist in forming project teams. This is often carried out when team members are selected from an available pool of resources from a distant location, due to which prior knowledge of team members is not available (Hosseini & Akhavan, 2017). These methods include using social network analysis (Wi et al., 2009), the use of algorithms to select teams for specific tasks (Gronau et al., 2007), or fuzzy optimisation technique to select project teams taking constraints into account (Baykasoglu et al., 2007). One of the aspects of a project manager's ability to assign the team he or she wants is affected by the authority vested in the project manager or the power S/he can wield in such decisions. This leads to a discussion on the authority that project managers have in their organizations to assign resources to their projects.

### **The authority gap**

Project managers often do not have the freedom to assign their team members, but rather they seem to inherit them (Stern 2017) and are often given whoever is available at the time of the assignment. (Lee & Bohlen, 1997). Pinto (2000) points to how project managers lack power to influence and secure the resources for their project, due to which they actively try cultivating tactics to influence and

negotiate to get the right resources when required. The use of influence is discussed in detail later in this article.

Anantatmula (2016: 141) suggests that 'whenever feasible the project manager should play a key role in team selection'. The challenge is that project managers do not have the formal authority to assign their preferred team members unless the project itself is so important, complex or large and the project manager is allowed some input towards, or even a free rein in team assignment. The product innovation literature often refers to such project managers as 'heavyweight project leaders' (Blindenbach-Driessen & van Den Ende, 2010). One of the reasons for the lack of authority of project managers is the matrix structure in organizations where functions and project co-exist. According to Ford and Randolph (1992), authority and responsibility is split between functional and project managers creating a conflict for resources. Functional managers often block recruitment of resources to projects as they view the initiation of a new project with suspicion because of its potential to upset the power balance by reducing the authority a line manager has over his or her staff (Pinto 2000: 89).

Hodgetts (1968: 211), one of the early authors to write about the authority of project managers, found that project managers face an 'authority gap', and must be vested with power if this authority gap is to be reduced. Pinto (2000) also confirms that project managers do not have a general base of power. Dunne, Stahl and Melhart (1978), Singh, (2009), and Thamhain and Gemmill (1974) have used French and Raven's (1959) sources of power to examine the power of project managers. The sources of power proposed by French and Raven (1959) are: legitimate; reward; coercive; expert; and referent. Singh (2009) suggests that, in general, expert and referent power bases are effective, but coercion does not work. However, Lovell (1993: 77) argues that 'the power base of the individual project managers depends on the status of the particular project and his/her reputation and influencing skills'. Crawford and De Ros (2002) add that project managers who are known to be successful can invoke additional power. Thus, the importance of the project and the reputation of the project manager could elevate the status of a project manager giving them more authority.

### **Project manager's influence in assigning team members**

According to Pinto (2000: 86), 'Project managers must also "cultivate other methods of influence" to secure the resources required for their project to succeed as they do not seem to possess power nor authority during the assignment process. Pinto (2000) suggests further that a project manager will have to take steps to understand the politics of an organization to cultivate the appropriate tactics to be able to influence and negotiate when required. Petter and Carter (2017) consider this to be



particularly important in assigning team members, saying that one must consider 'which groups and people have informal power in areas of importance to the project' (p. 77). Crawford and de Ross (2002) support the need for political acumen in securing resources by stating that 'there is a strong correlation between organizational politics and acquisition of resources'.

Several authors have expressed the need for political acumen in project managers to be successful. Pinto (2000:91) argues that 'for better or worse project managers do not have the luxury of turning their backs on organizational politics' and 'politics constitutes one organizational process that is ubiquitous; that is, it operates across organizational and functional boundaries'. Lovell (1993: 73) adds that 'failure to understand the (...) political process has been the downfall of many good projects. Peled (2000: 27) also emphasises the relationship between interpersonal and political skills, explaining that political skills require the application of interpersonal skills which project managers are often trained in. 'Political skills refer to the manager's ability to use his/her interpersonal relationships with employees, colleagues, clients and supervisors'. Ferris and Davidson (2005: 3) point out that political skills are closely related to influencing skills: 'Being able to influence others at work through persuasion, orchestrating support, and inspiring trust and confidence is the essence of political skills'. So, we discuss the literature on influence next.

A review of some of the seminal literature on influence tactics used in organizations will help to understand the ways in which project managers use influence in assigning team members. While the literature on upward and downward influence in organizations has been investigated, the role of lateral influence is not discussed in detail in the literature. However, in the study reported in this article, lateral influence was observed to be one of the common strategies used in practice by project managers when they did not enjoy power or authority to assign team members.

One of the early studies on managerial influence is by organizational behaviorists Kipnis, Schmidt, and Wilkinson (1980: 440), who wanted to know how 'people at work influence their colleagues and superiors to obtain personal benefits or to satisfy organizational goals'. They noted that existing studies found that people 'do not exercise influence in ways predicted by rational classification schemes'. They studied more than 350 influence tactics offered by respondents that were combined into 58 dominant influence tactics. Based on their study, Kipnis and colleagues propose seven dimensions or strategies of influence (Kipnis, Schmidt, Swaffin-Smith & Wilkinson 1984):

1. Reason: Use of facts and data
2. Friendliness: Using impression management, flattery and creating goodwill
3. Coalition: Mobilising other people
4. Bargaining: Negotiation using exchange and favours

5. Assertiveness: Being direct and forceful
6. Higher authority: Gaining support of higher levels
7. Sanctions: Use of reward and punishment

Yukl and Falbe (1990) developed measures and scales and successfully carried out two studies replicating most of the results of Kipnis et al.'s exploratory study (1980: 139). They also confirmed that 'managers have different reasons for influencing subordinates, peers and superiors'. They then added two more tactics – inspirational appeal and consultation to the ones proposed by Kipnis et al. (1980).

1. Inspirational appeal – Emotions using values and ideals to arouse enthusiasm
2. Consultation – Including others in a decision or when planning a policy, strategy or change

Higgins, Judge and Ferris (2003: 8), who carried out a meta-analysis of influence tactics and work outcomes, note that 'individuals may not use the same strategy for influencing in every situation' and 'different individuals may choose different influential strategies'. They suggest that 'a number of contextual factors and individual differences determine' the choice of a tactic. They also report that Jones and Pitman (1982: 91) added self-promotion by 'creating an appearance of competence or that you are capable of completing the task' as another tactic for influencing.

In summary, due to lack of formal authority and legitimate power, project managers must rely on their ability to influence laterally to secure the preferred resources for their project. Research where project managers examine their influence tactics have used the work carried out by Kipnis et al. (1980) and Yukl and colleagues (Yukl & Falbe 1990; Yukl & Tracey 1992).

Therefore, the authors would like to address the following additional research question in this article:

What influence strategies/tactics are being used in practice by project managers to assign team members to their projects? And, as a corollary to this question, which of these strategies have proven to be most effective?

## **Method**

The empirical material reported on in this article was collected as part of a global study on balancing leadership. So, we first describe the research methodology adopted in the overall balanced leadership research before explaining how the data collected for the main research project is subsequently used to develop this article. The main study was based on the philosophical stance of critical realism (Archer et al., 1998). This stance combines the perspective of an objective and measurable reality with the

assumption that people's interpretation of this reality is situation dependent and subjective. Hence, similar experiences are interpreted differently by different actors (Archer et al., 1998), and studying phenomena aims for identification of a possible but not necessarily the only explanation of the phenomena (Bhaskar, 2016). This philosophical stance also underlies the theoretical framework to which this study contributes (Müller et al., 2018a), which provides for consistency in perspectives between the main study and this article.

The first phase of the global study (using mixed methods) was carried out as an exploratory case study (Yin, 2009), with interviews and secondary data from websites and published company information as the main sources of data. The data used for this article is from this first qualitative phase. At this phase, abduction was chosen as research approach, which combines the credibility of deductive reasoning rooted in existing publications on empowerment, with the creativity of inductive reasoning from new empirical insights and the researchers' own experience (Alvesson & Skoldberg, 2009) in order to derive new knowledge. Interviews were chosen as the main source of qualitative data collection in a cross-sectional time setting.

For this article, case studies conducted in Australia, Scandinavia and South Africa have been used. According to Yin (2009), using more than one case provides the possibility both to predict similar results as well as contrasting results but with predictable reasons. Looking for similar results helps to determine under which conditions a phenomenon is likely to be found and looking for contrasting results can help explain the conditions when the phenomenon is not likely to be found. Also, including more than one case can broaden and add robustness to the findings (Yin 2009). The details of the case studies used for this article are shown in Table 1:

Country/Region	Australia (Aus.)	Scandinavia (Scan.)	South Africa (SA)
Number of cases	4	5	4
Number of interviews	20	26	16
Category of people interviewed	Senior Leaders, SL (6) Vertical Leaders, VL (6) Horizontal Leaders, HL (8)	SL (8) VL (12) HL (6)	SL (8) VL (4) HL (12)
Industry Sectors	Financial Services, Software Firm Construction	Construction Military defense Consultancy	Financial Services Engineering
Analysis Method	NVIVO 11	NVIVO 11	NVIVO 11

**Table 1: Summary of Data Collection and Analysis**

### *Interviews*

The qualitative part of the study consisted mainly of interviews. The age of the interviewees ranged from 25 to 50 (mean=35.5) years, with a tenure of 2 to 12 (mean=6.5) years in their current position, and project team sizes from 4 to 50 (mean=19) team members.

The interviews were carried out by a team of 2 to 4 researchers, whereby one was leading the discussion, while others asked more probe questions and took notes. The interviews lasted between 30 and 90 minutes and were voice recorded and then transcribed, with informed consent from the interviewees. Informed consent was collected after carefully explaining the nature, scope and aims of the study, as well as the ethical implications for the interviewee (anonymity, can stop at any time, free to skip questions, no right or wrong answers).

All interviews followed the same set of questions, which was developed upfront and piloted in four interviews. Three blocks of questions were asked: a) general information about the organization, its projects, interviewee's role and experience; b) questions for senior leaders; and c) questions for project managers and team members

To ensure validity of the questionnaire a research protocol was developed, and pilot tested in three case studies in China and Australia. An English-speaking and a non-English-speaking country were selected for the pilot to ensure that the questions elicited the expected responses even when they were translated. The data from the pilot cases were also analysed to ensure the quality of the questions (Müller et al., 2015). Questions were then improved based on the responses. The researchers in the three countries followed the research protocol agreed upon to maintain consistency in collecting data. The pilot study revealed that we needed to also interview senior managers as they sometimes influenced how projects were led. The questions constructed for the research protocol were then segregated so that only relevant questions were asked at distinct levels (senior manager, project manager and team member) to conduct efficient interviews. Human Research Ethics Approval was obtained prior to starting the study.

#### *Analysis approach*

We followed Miles et al.'s (2014) process of data collection, data display, data reduction and conclusion finding. Initial coding provided for identification of relevant information by interpretation of the interviewee responses.

Peer reviews of transcripts can enhance rigour, so three members of the research team separately interpreted the interview material from all locations and engaged in subsequent discussions to reflect on similar and different interpretations and worked together to tease out the empirical findings. NVIVO 11 coding was used to capture information related to the team assignment process.

Coding was carried out as follows. First interviews from each case were coded using some pre-selected codes and new codes emerged as the analysis progressed. Once each case was analysed, a constant comparison process was undertaken with new codes emerging through the comparison. Categories were developed and refined after checking the relevance of previously coded text and newly created codes. To improve transparency, we provide rich descriptions of our findings using actual quotes from interviewees in our analysis (Bansal & Corley, 2011). The categories arrived at each location were then exchanged between the authors and the final categories discussed in this article were arrived at jointly.

#### **Data analysis – findings**

From the analysis of the data the following practices were found in the case studies. The identifiers used for the respondents use codes combining the country where they were from and their role. For example:

AusSL – Australian Senior Leader

AusVL – Australian Vertical Leader

AusHL – Australian Horizontal Leader.

From the open coding, five overarching themes emerged (from the sub-themes that resulted from the open and axial coding):

The first two themes are related to a project manager's power or influence, or lack thereof, in the assignment of team members to their project.

1. The Project Manager (VL) was able to influence the assignment of team members.
2. The Project Manager (VL) had no control over who was assigned to his/her project.

Table 2 shows a summary of the subthemes that led to the main themes.

<b>VL able to select or influence team nomination/selection</b>	<b>VL is provided a team for the project</b>
VL able to choose	Functional managers assigned team members
Identified by VL	Team members were assigned by external organizations
Ask others about prospective team members	HR department recruited the team members
VL able to specify needs	

**Table 2: Summary of sub-themes from the case studies** (Developed from this study)

*Theme 1: Project manager had the power or was able to influence team member assignment*

The case studies demonstrated that project managers used various sources of power to gain resources. One project manager considered past successes (expert power in managing a successful project) as a way of attracting resources. 'People like to keep following past successes. If you've delivered something in the past well and you worked well, then they always jump at the chance to work [with you] again' (AusVL). Even though not recommended in the literature (Keys & Case 2010), project managers sometimes used a higher authority to support them in securing resources using legitimate power indirectly. This has been observed by Crawford et al. (2008) where the sponsor can provide such indirect support.

The case studies demonstrated a few instances where the project manager had the power to ask for resources. It was also evident that team members were attracted to join projects led by successful project managers.

As one project manager said, 'I was able to recruit. In the first line of work with X to get the right skills and the right people on board, and that was really great' (AusVL). Another project manager confirmed that project success could make it easier to recruit team members to the project. 'People like to keep following past successes (AusVL).

In general, it was rare to find cases where the project manager had full authority to assign a team member. Instead power, politics, influence and relationships played a part.

One tactic used by project managers to find suitable team members involved using their *social relationship* with functional managers, who had control over the human resources, to identify 'stars' whom they later tried to allocate to the project. According to an SL from Scandinavia, project managers went to the functional manager in charge of the functional unit who could help them as they knew 'Some people are "stars" – people know about them'. This was echoed by a Scandinavian project manager (ScanVL)'.

Another strategy was using the project manager's *prior knowledge* about people who would fit before asking for these people to be assigned to the project team. An Australian project manager confirmed, 'I worked with people here before. I know what person that I might want. I'll go and talk to them to see if that person is available' (AusVL). This indicated that the agreement from the team member to join the team was confirmed before approaching the stakeholder who could release this member to the project team.

The case studies also indicated another tactic that project managers used. They tended to keep track of people they had previously known as high performers, in order to try to assign them when they recognised a need for their competence.

As an example, 'So, it's just about trying to see who you really think could do a good job and then keep track of where they are. I have one candidate now [...] who I very much would like to have, but she's in the United States and, when she comes back, she's on my short list. And I have a few of those [types of] candidates' (ScanVL). This project manager was willing to wait for the appropriate team member to be available.

It was important to know whom to ask. For instance, a Scandinavian project manager explained that 'we just ask the right people to be involved. You know, we know each other. We know who needs to

be involved in the project and then we try to get them on board. We have worked together for many years, the most of us". (ScanVL)

Similarly, a project manager from Australia stated: 'I worked with people here before. I know what person that I might want. I'll go and talk to them to see if that person is available' (AusVL). Prior knowledge of team members seemed to be a key factor for project managers trying to secure efficient resources for their project. This was particularly evident from the Scandinavian cases. 'I have known the project team members for many years. They are carefully selected for this project' (ScanVL); 'We have been working together a long time, many of us. I know who I should include in the project. (ScanVL); and 'I know it quite quickly who I should include in my project. I've been lucky to meet a number of talented people in VIA (the firm). Mostly, I guess, I trust the people that have been recruited to be the right people for their positions; recruit them to the project accordingly" ( ScanVL). In some cases, informal conversations are used to gauge the suitability of a team member before approaching their managers:

*'But when it comes to getting the right people I try to... I walk around, try to see what people discuss a little bit and then I always get an impression that this one or this one is really a talent. So, I try to have a list of, or, not a formal list, but I have 3-4, perhaps up to 10 people that I have sort of seen having a good capacity and that could be in the project or other places. Because when we need change in a function, I have a list of candidates in my head that I can start discussing with. So, I have a very good overview.'* (ScanVL)

When prior knowledge was not available, or it was difficult to talk to the potential members, project managers seemed to resort to specifying the type of people they wanted; for example, an Australian project manager described it like this:

*'With my team lead on this program, we needed somebody that was going to have to roll into operations afterwards, so [...] we needed an IT treasury system lead, for lack of a better term. Somebody that would be able to understand the business, understand everything we've delivered for them and how certain escalations would actually work in operation.'* (AusVL)

On the other hand, in South Africa the managers seem to identify appropriate stakeholders and build a rapport with them to look for resources. 'So upfront, you identify the appropriate stakeholders they're going to approve. That is documented and reviewed and that's normally your core team or people involved and then your authoriser.' (SoAVL).



*Theme 2: Project manager had no control or influence:*

Next, we discuss instances from our case studies where the project manager had no, or very limited, control or influence over the assignment of team members to their projects. This problem was more prominent when other organizations held the resources, which prevented project managers from using their authority or exerting any influence.

For example, one project manager said: 'The size of this program, [...] because we've obviously got partners, so we are in the hands of those in terms of giving us the right people.' (AusVL)

In some other instances, it was found that the functional manager decided who should be assigned. 'Sometimes in organizations you're given people. When you're given people, you can mould them. So, if I'm given a person, I've got to understand what their strengths are. Then I've got to look at what my needs are.' (AusVL)

There were also examples where neither the project manager nor the functional manager influenced the assignment, as this was left to the human resources department:

*'The human resources department prevented project managers from recruiting the right people. I had very little input. Again, I had a rap on the knuckles because I was interviewing some of our partners, and the human relations manager and the partners side said: "No, no, you can't interview the people. We need to tell you these are the right people for you".'* (AusVL)

Another project manager echoed the lack of control over assignments: 'It's not entirely up to me, I don't choose who I want to work with.' (SoAVL); 'Like I said, they introduced this resource pool idea, so you just send out your requirements to all the teams and then they tell you you will be working with this person.' (SoAVL)

In addition to the two themes on project managers' high/low influence, the following three themes emerged from the analysis:

3. Some specific characteristics sought in team members
4. Issues that arose about nomination or selection assignment that affected the project in some ways.
5. Practices adopted in assigning team members

### Theme 3: Characteristics

A variety of expectations about team members emerged from the interviews, some of which were in alignment with the literature. The project managers emphasised that they look for:

1. People who are very technically skilled, and with a high ability to perform; for example, they said: 'I don't want people who just want a seat, I want people who want to make a difference. (ScanVL)
2. Interpersonal skills were seen as most important; as an example, one project manager said: 'In recruiting, I'm looking for persons who are able to present themselves, using humour in the way they speak. I think I'm kind of looking for [...] interpersonal skills.' (ScanVL)
3. Project managers emphasised the ability and will to be a team player and good fit with the team. They talked about the need for balancing the team and have complementary skills/diversity; for example, a project manager from Australia said: "You need to, kind of, start to build a team that will complement each other. Not necessarily exactly, they're not all of the same mould, just complement each other" (AusVL). Another project manager described this well:

*'I often end up involving the people I find most competent. And then, there is something about respect I think. They are humble – competent in their disciplines but not screaming out loud. Humble and show respect for others. Then I feel I can involve them. I want them to be team players – we like to work in a flat structure – and I want them to include each other.'* (ScanVL)

This was also echoed by a South African project manager. 'It is solely dependent on the role players of the project. All role players must be willing to enter in collaboration and they must participate for a single goal.' (SoA VL)

4. The project managers also looked for experienced people to become part of the project team. "Also, I tend to involve people with long experience. I like that people are experienced and I listen to them. My team is a group of high age and experience – and only men [...] I have a tendency to recruit the old guys. It is important though, that they show that they want to take part". (ScanVL)
5. Leadership traits were also frequently mentioned by the project managers when listing the characteristics, they sought. A project manager in South Africa suggested adopting strategies to select team members to be ready to take on leadership roles. 'You have to have a strategy to put the right people in your team that will lead horizontally.' (SoAVL)

#### *Theme 4: Issues*

Several issues arose in team selection that had a detrimental effect on the project. Project managers described multiple issues like tensions between the project manager and the functional manager; the problems they faced when functional managers decided to retrieve valuable resources from the project; and the problems related to being assigned resources that lack required knowledge; for example, on the project context.

The cases demonstrated tensions between *project managers and functional managers* when both played a vertical leadership role in a large program. One project manager described it like this:

*'The slight variation is our team leaders still have a portfolio of work with what to deliver as well, so there's sometimes that tension ... because we have a small pipeline of work that we're always going to deliver from the business, so you start creating that tension of where we need to be using resources going into various projects'. (AusSL)*

Another issue was the perceived impact on project development, when project managers were *not given the people they wanted and had no authority to change that decision*. One said; 'That's where I start failing because the five resources who were committed to me are now gone, but the delivery manager he says, "No, I'll give you another five". They are treated as numbers like, "A, B, C, D and E are gone, I'll give you others". I said, "No, I need A, B, C, D and E only. If you give me X, Y and Z, it won't work.'" (AusVL)

Many project managers also described how parts of their project assignment were outsourced and how the company involved assigned the resources to take care of the tasks. Project managers described problems with these resources they had been assigned having very limited knowledge about the context of the project – and how that was challenging for collaboration in the team. For example, one project manager explained:

*'When it's someone in Poland, or in India, or in Dublin, they don't know what's happening. When we write documents, we work on a very explicit-implicit model, as in 30% to 50% of the content will be explicit on your document, 30% to 50% will be implicit and shared knowledge. Whereas if you were for example in India in Bangalore, you don't have that implicit knowledge. You have 17 questions when I send your document, and then you and I think this person is so ... She claims to be an expert and she's asking really basic-level questions. That's because she doesn't know the environment, she doesn't have the implicit knowledge.'" (VL)*

### Theme 5: Practices Adopted

From the case studies we also identified some practices adopted in evaluating team members for assignment:

1. Project managers look for people who are recommended by senior persons, rather than looking at personality tests etc. For example, one project manager said:

*'When people start in VIA (the firm) they take different tests like personality tests. They have very good processes for recruiting so people are generally easy to work with. They can take responsibility and they want to. We have databases and competence matrixes, but I don't find them useful for me in recruiting. Better to ask a senior person's advice on whom to contact.'* (ScanVL)

2. Project managers set tasks to evaluate. As one project manager explained, 'Also, I test them in different ways to see if they should be part of the project, like I give them tasks, so they can try out' (ScanVL).

3. In South Africa a joint workshop by external experts helped to find team members.

*'In the beginning of the project, once you understand what the scope is, we do what we call a method adoption workshop. So, it's external guys, the technical review board I think it's called, but it's external guys that's not on the project that have got expertise in testing and expertise in the requirements and expertise in development and they attend those sessions as well and they make decisions for the project.'* (SoA VL)

In general, the project managers interviewed seemed to rely on personal judgement; opinions of others who had knowledge about team members; prior engagement with competent team members; and rarely used tests or similar evaluation methods reported in the literature. There were some instances as reported above where some structured methods were used. No mathematical methods were used.

### Discussions

The initial questions that led to the paper were:

1. How are project team members assigned in practice and by whom?
2. What do project managers do to have their preferred resources allocated to their project?

It was found that despite the recognized need for project managers to form their own teams, this study found that project team members were more frequently assigned by their functional managers, the HR department or external organizations than by project managers. This was mainly because project managers lacked the authority or power to secure their resources.

The analysis indicates that the Australian and Scandinavian project managers, who assigned project members when they could, emphasised knowledge and skills of potential team members, i.e. to achieve high performance, but they also considered the importance of interpersonal skills. Other important characteristics they look for are the person's capability to be a team player, to take on leadership – as well as how the potential team member would affect the balance in the team in terms of its diversity and complementarity in competencies. In recruiting, they also considered if the member is recommended by others. Even though the interpersonal skills and the ability of being a team player is emphasised, they also describe how they found it hard to assign the 'right' team members as well as difficulties to specify the skills they need in the project. In other words, the competence aspect seems highly important in the considerations about whom to nominate but this became an issue when the project manager was not fully cognisant about the needs as he or she was not a technical expert. Our findings align with the emphasis on the competence and technical skills of the member assigned as being important (Katzenbach & Smith, 1993), that interpersonal skills were important as well (Morgenson et al., 2005) but did not find evidence that project managers placed much emphasis on shared values (Chiocchio et al., 2015) or looked for a much deeper sense of purpose (Martinelli et al., 2017).

Our findings point to a rather structured process of assigning resources in South Africa, embedded in considerations about competence need and capacity, while the project managers in Australia and Scandinavia assign team members through less structured and more social processes. Obviously, for the managers who have high influence on the selection of team members it becomes important to get to know people in the organization to identify potential candidates, both to identify these people themselves, and to ask others about potential candidates. When they were unsure about a certain member, they described a process of testing them in the form of assigning them a few tasks and evaluating their work. In this way they could test both their ability to perform but also, to some extent, the persons' commitment to the team and the project. Commitment is important to develop teams and especially to the develop high performance teams (Katzenbach & Smith, 2003) and to see if they are accountable, which is another important asset for high performance (Martinelli et al., 2017: 56).

As the authors analysing the data collected from case studies a third question arose:

3. What influence strategies/tactics are being used in practice by project managers to assign team members to their projects? And, as a corollary to this question, which of these strategies have proven to be most effective?

Our analysis pointed to some specific influence strategies used by the project managers to secure the right team members for their projects. One of the tactics used by project managers was their 'creating

an *image of competence* or “heroism” by promoting previous successful projects. This can be found in statements such as ‘people like to keep following previous successes’. This also supports the finding that expert power is one of the aspects that are effective in organizations.

Another tactic used by project managers in the case studies was *coalition* with other managers in the organization to identify the right people, which is evident from statements such as ‘some people are “stars” – people know about them’, and ‘we just have to ask the right people to be involved’. Also, project managers looked for coalition: ‘You identify the appropriate stakeholders that they are going to approve’.

Also, the case studies demonstrated a tactic that has not been previously identified in the literature – ‘*taking a gamble*’, supported by statements such as ‘You don’t always get a yes for requested resources, but you can always try’, and ‘build rapport’ with such stakeholders.

Another tactic emerging from the case studies is *waiting for the right time* when it was observed that a project manager ‘keeping track of where [resources] are’ to nab them when they become free. This is also confirmed by the statement that ‘I walk around, try to see what people discuss a little bit’ with an effort to identify talent; and ‘I know what person I might want. I will go and talk to them if the person is available’.

While many of the Scandinavian and Australian project managers in this study could exercise direct influence on who would be assigned to the project, all four cases from South Africa indicated that the project manager had very limited or no direct influence on the selection of project team members. Rather, they tried to influence the staffing of the team in subtler and strategic ways. So, the national culture seems to influence the tactic used, with more direct approaches in Australia and Scandinavia and more lateral influencing tactics in South Africa. This would require further investigation for confirmation.

Table 3 lists the lateral influence tactics observed in the case studies reported in this article.

Found in the literature	New tactics identified from the cases studied	Description of tactic
<i>Creating an image of competence</i> (Jones & Pitman, 1982)		Convincing people that you are a capable project manager through delivering successful projects
<i>Creating coalitions: Mobilising other people</i> (Kipnis et al., 1984) Could also refer to <i>Consultation</i> (Yukl & Falbe, 1990)		Working with stakeholders and functional managers to secure the right resources. Although this can also be interpreted as gaining support of higher authorities, this may have a negative effect on future relationships.
	<i>Taking a gamble</i>	Asking for resources without expecting success, hoping that it might work
	<i>Waiting for the right timing to approach</i>	Keeping track of resources to get them when they are released from another project or scouting for them through informal channels
<i>Reason: Use of facts and data</i> (Kipnis et al., 1984)		In project situations this could refer to specifying the characteristics of the team members required.

**Table 3 Influencing Tactics adopted by managers interviewed in the case study**

The study of influence tactics by project managers has also been reported in the project management literature. However, most of these studies have focused on team management and not on team assignment, which was examined in this article. Soitiriou and Wittmer (2001: 18) argue that influencing is an essential people management skill for project managers. Based on two studies they conducted to develop an influence model for project managers, they found that influencing is one of the ways in which project leaders try to overcome the authority gap. They emphasise that ‘creating professionally challenging projects is the single most important factor for team members’. They concluded from their studies that ‘from the project manager’s perspective, important factors in overcoming the authority gap included persuasive ability, negotiation and management competence’.

Two studies have been reported on influence strategies of project managers in engineering management journals, which also refer to the previous studies of Kipnis et al. (1980), Yukl and Falbe (1990), and Yukl and Tracey (1992). Lee and Bohlen (1997: 8) suggest that while the role of a project manager has many dimensions 'the essence of effectiveness lies within the ability of the project manager to successfully influence people'. They add that 'the success of influence attempts depends on the methods employed, the skill in applying these methods and the perceptions of the target people'. Lee and Sweeney (2001: 10), following a study of Lee and Bohlen (1997), carried out an assessment of influence tactics used by project managers. They propose that 'one noteworthy interpersonal skill is the ability to influence other people'. Another key observation they make is that 'it might be a serious mistake to simply transfer influence study results from traditional management setting directly to the project management area' (Lee & Sweeney, 2001: 16). The important findings from this research were (Lee & Sweeney, 2001: 23):

1. There is no one best tactic or set of tactics for all situations.
2. Different tactics require different skills to apply and commitment of time.
3. Some interpersonal skills are more important to pursue some of the tactics.
4. All influence methods are not based on any logic.
5. Low-use tactics (such as assertiveness) may have a downside

In summary, influence tactics are becoming an essential skill for project managers to succeed. From our study we found that project managers used three of the influencing skills reported in the literature: Creating an image of competent project manager to attract team members; creating coalitions or consulting with stakeholders who had the power to assign resources; and using facts and data to convey required skills and attitudes from team members. They also used two new tactics: Waiting for the right opportunity and taking a gamble as part of their array of influencing tactics. These tactics have appeared to have had success with securing the right resources.

### **Limitations**

Even though this study involved three diverse locations around the world; namely, from Europe, Australia and Africa, the results should not be viewed as representative of each continent where the interviews were conducted. The European study also focused mostly on Scandinavian countries, Africa only involved South African organizations and most of the Australian interviews were conducted in New South Wales. The results should be viewed as indicative and would require more data to be collected to confirm or disconfirm the findings from this study. The study did not anticipate that national or organizational culture would play a part in the tactics used, which aligns with the thoughts



expressed by Lee and Sweeney (2001) that different tactics may succeed in different contexts. This will be worth investigating in the future.

### **Conclusions and Recommendations**

This article explored the concept of assigning members to project teams. The study contributes to the project management knowledge base by providing evidence to support two main points, namely, the project manager's influence or lack thereof, on team member assignment and the process of identifying characteristics desired of team members. There also seemed to be differences between the Scandinavian/Australian approach and the South African approach.

A competent and efficient project team remains one of the most important aspects of project success. Apart from general group or team formation there appears to be limited literature or research done on the formation of project teams as well as the processes or methods used to identify and assign team members to projects. It became clear that approaches exist for project team member assignment with no definite or agreed process in existence. The study also highlights project managers' frustration over limited authority in team member selection. Given the observations and discussions, recommendations for future research are:

- What other political/social/organizational influence can be exerted by the project manager during the team member assignment process? Does this vary with the context?
- What is the most effective process or method of team member assignment on projects?
- Investigate whether the type and phase of project has an influence on the assignment process.

It is also evident that psychometric testing to nominate the most appropriate project team members is hardly used in project situations. It is therefore recommended that organizations in which projects play a key role adopt some of the good practices used in permanent organizations to assign appropriate team members to improve the performance of their projects.

Given the differences in approach in the three participating regions, the study could be expanded to involve more countries for the developing and the developed world.

In conclusion, this article contributes to the project management literature on teams as well as to the management literature on the types of managerial influences used in project organizations. It confirms that three influence strategies identified in the management literature are relevant and used in project organizations, in the context of team member assignment, and proposes two new influence strategies used in project organisations that were not reported in the management literature. This article also contributes to project management practice by highlighting the need for project managers to develop political and influencing skills to help their projects to have the right resources to succeed.

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