

# Today's Most-Competitive PM Teams: Shining a Light on Next-Gen PM Practices

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## Abstract

In every generational change, the seeds of success are sown by the pioneers in prior generations. For example, many foundations of the last fifteen year's popular project management topics, including agile pm, business analysis, strategic alignment, and applied leadership and interpersonal skills in projects, were the competitive advantages of leading companies and agencies of 1985-2000. Further, the recent interest in "PM 2.0" merely showcases the frequent practices of PM innovators of the last 30 years.

The practice of professional project management has now seen four 15-year generations, with different areas of emphasis in each new generation. Given this history, this session provides a series of vignettes that shine the light on past and current-generation elite and competitive practices that are now mainstreaming to form the **Next-Gen commonly-accepted practices** in project and program management.

## Shining a Light: 7 Sample Vignettes

- A. The Myth of PM Best Practices
- B. Reassert Practice Importance
- C. Adapt Methods to Project Size
- D. PM Role Excellence and Key Processes
- E. Overcome Management Complexity
- F. The Role of Leadership and Soft Skills
- G. Align Projects and Business Strategy



Who is integrating smart and innovative PM practices today? What are the challenges they face in implementing them? What pm performance advantages are they gaining? And, what are professional associations, trainers and consultants doing to help practitioners reap the benefits?

## A. The Myth of PM Best Practices

What are the **Best Practices** in the world of project and program management (PPM)? Are there a few immutable truths that are transferable across nations, organizations, industries, cultures, and project teams? I often see assertions promoting PM Best Practices—despite my belief that the phrase is an oxymoron—that our discipline is not yet mature enough to have universal best practices. This section is a recap of many discussions on best practices over my years as a PM practitioner, and as a consultant.

My opinions about PM Best Practices go back to the early 1980s, when, as a PPM consultant, I frequently encountered executives, line managers, project managers, and other consultants, who expected to hear my handful of easy-to-implement "PM Best Practices." In that era, I often made recommendations for improved effectiveness and performance, but I called them "Competitive Practices."

And, I usually sought, uncovered, and identified these practices from *within their own organizations*. It was clear years ago that one organization's best practices could be a scourge for others. Here's why...

### **Best Practices Vary**

Best Practices vary across contexts, because they are sensitive to:

- The national culture(s) of your organization;
- The industry you are part of;
- Your corporate culture;
- The size of the project or program;
- The nature and part of your organization you work within;
- The size of your work unit;
- Specific situations within a project;
- ... and other contextual factors.



When William Duncan, primary author of the original 1996 PMBOK® Guide, wrote about the industry-changing knowledge areas and practices he helped establish, he did not call them Best Practices. Instead, he described them as “applicable to most projects most of the time.” **Bravo!** Such insight he demonstrated! For example, many commonly accepted practices on large projects would crush almost all small projects; they are too heavy.

Most of today's so-called, “Best Practices” are actually merely commonly accepted practices. And, as mentioned above, they are not all universally appropriate for their situation. Taking this blasphemy a step further, most Standards are merely average practices—or worse, *least common denominators*. Thus we offer our clients insights into differentiating competitive practices.

And where do you get these practices? You find them in your organization. However, this topic could be an entire presentation and paper on its own; our purpose is to create dialogue around this question, not to limit this paper to just one basic truth. We have written a blog post that continues to explore this topic. See it at the asapm website: <http://www.asapm.org/chgagent/the-myth-of-pm-best-practices/>. The scenario we share in the presentation took place in Dallas, in the early 2000's; the company name is withheld to protect the innocent, and the company was acquired by CitiGroup.

### **B. Reassert Practice Importance**

Practice doesn't always make perfect; in fact, poor practice is worse than none at all. But good practice benefits all—especially in project and program management. We are all familiar with the story of the tourist in New York City, wanting to visit the legendary Carnegie Hall, site of some of the most beautiful concerts. They spot a musician carrying a violin case, and asked him, “tell me, sir, how do I get to Carnegie Hall?” His reply: “Practice, practice, practice!”

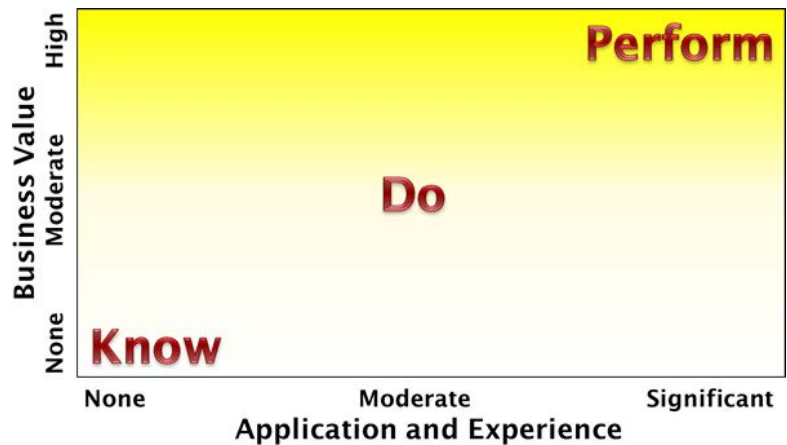


The same is true in the world of Project Management: **Practice is the only path to performance.**

Most of us know that PM Performance does not come from memorizing knowledge area processes, then forgetting them. Instead, it demands *applying* that knowledge, to transform it to skill, competence, and then, peak performance. In other words, just like in getting to Carnegie Hall, it's a matter of practice. However, this is not just practicing the same methods, tools and actions on the same projects, over and over for five, ten, or fifteen years. The most effective practice expands your range of flexibility in applying your pm competences in projects of increasing size, risk, complexity, and organization impact.

This ever-broadening practice is an essential ingredient in converting acquired knowledge into workplace results. But application alone is not enough. That practice also requires support, coaching and feedback.

This support is needed to move from Knowing, to Doing, to Performing, as shown on the chart at the right. And for each key competence, reaching high levels of performance is where you generate the highest levels of Business Value.



On the other hand, if you don't continue to improve, or worse, pick up lazy habits (as we can all tend to do), you see gradual decay of your performance, because **poor practice seldom makes perfect**. This is a good parallel to world class athletes in most sports, who continue to practice between events, to improve their consistency, teamwork, and performance.

Today, most professional organizations that have not heretofore understood the importance of competent and performing PM practice are beginning to change their story. They are moving from knowledge-based assessments, to assessments of performance and business results. As this occurs, all their members, stakeholders, and participating organizations are seeing benefits. For some, this is not new. For many others, it is a fundamental change in the way they do business.

In the meantime, high-performing project managers (and world class athletes) will continue to:

- Increase Practice Effectiveness
- Regularly review practice results for strengths and weaknesses
- Savvy coaching required! Manager? Coach? Peers?
- Introspection, self-evaluation, critical thinking
- Record, review, and apply Lessons Learned
- Perform a competence assessment against a valid competence (not just knowledge) baseline
- Establish and update your Competence Development Plan

This is *not new*—just another example of long-held secrets of top performers in project management.

### C. Adapt Methods to Size

Fact: One-size method does not fit all! This comes as a surprise to many people. And, as illustrated by the two photos of shoes at right, there are other differences beyond size, including style. Why, you say? They are both red! While shoes and projects are different in many ways, the analogy holds as true for projects as for shoes. Thus, high-performing project teams adapt their methods to the project's size and complexity.



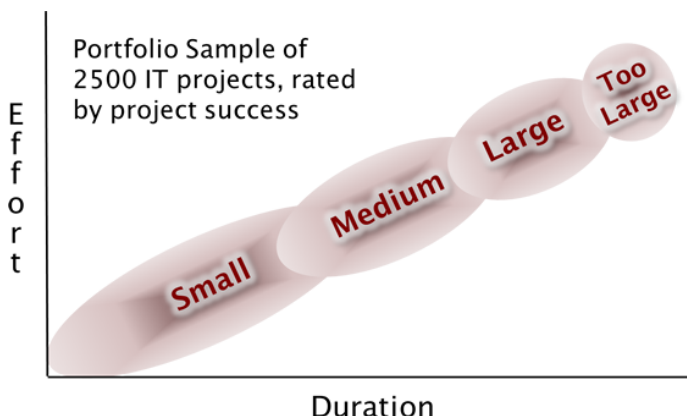
This insight goes back to the late 1970s and early 1980s, when monolithic IT pm methodologies such as SDM-70 and Method One prevailed. Understanding even then that one size does not fit all, our consultancy spent considerable time and effort scaling 35000 hour methodologies to the 3500 hour midpoint of our clients' typical approaches.



There is a rule-of-thumb that helps guide consultants and practitioners in scaling methods to their situation. We call it **The Fourple Factor**. Here is an example: a pm method built for a 4K effort hour project will work very well for a project that is half or twice as large: 2K or 8K hours. It will work, with adjustment, on the one-third or triple-sized effort. And the project will *consistently fail* at the fourple factor.

This scalability requirement means you must have multiple-sized methods for each path through your methods suite. For larger projects, you scale up the methodologies. And for smaller projects, your teams do much of the same work, but they may have fewer phases or milestones, less-deep work breakdown structures, fewer document templates, less rigor, and less overall administrative work. That is scalability.

Our pm methods scaling model began with a research project that sought the "sweet spot" for a client organizations' pm methods. We did a scatter diagram of several years of project history, based on three factors: Effort, in hours, Duration in months, and Success (which is another entire paper, or more). We



found that there were four logical groupings of project size, along the success diagonal. Of course, there were also many orphan projects.

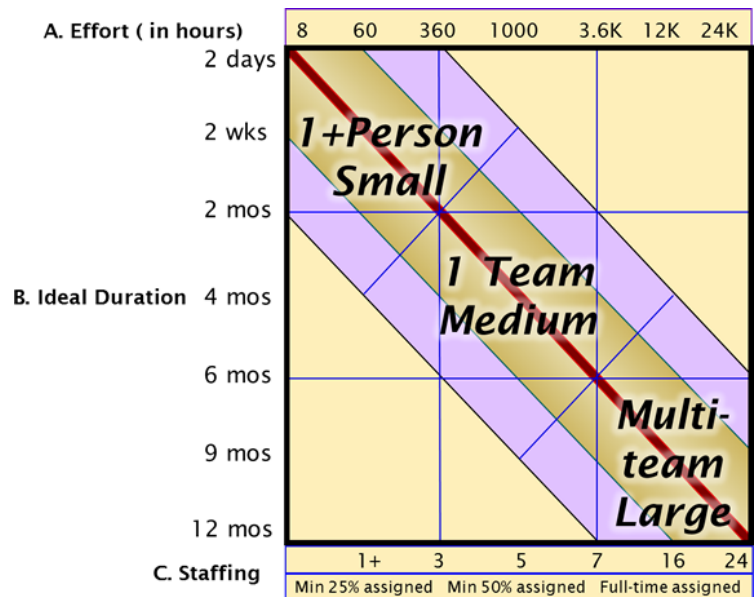
The amplitude of project success determined the size of the dot on the scatter diagram. The diagram at left is a representation of the results. It formed the basis for a quantum leap in understanding pm methods scalability that we tested in many other client organizations.



Over time, and with adaptations for different application areas beyond Information Technology, we developed the “Successful Project Profile” shown at right. This tool has been used by tens of thousands of high-performing project teams for over 30 years to determine the optimum duration and staffing for a given effort (size) of project.

They (and their savvy managers) also use it to establish the right role of project manager, and to illustrate the level of risk in violating “The Success Diagonal.” The insight: Not only does one size fail to fit all, but projects fail when the methods, duration, or staffing

are not appropriate for the project. Much more information on this tool/guideline is available on the ProjectExperts website, at <http://projectexperts.com/assets/SuccessProfile2010.pdf>. And here is one finding from our years of use of the Successful project profile: Small projects are often the least-well managed, and the greatest opportunity for improvement in most organizations.



## D. PM Role Excellence and Key Processes

For years, pm training focused on teaching project managers how to more effectively manage their projects. As that audience became over-trained in the mid-1990s, certification prep training became the larger focus of many training companies. However, most are still missing a bet. In most organizations, even those that are project-oriented enterprises, less than 10-20% of employees are project managers. And, a half-dozen other key roles have significant impact on project performance. Those include:

- Sponsors/Resource Managers (Functional Managers and other middle managers)
- Top Managers—The Executive Suite
- PMO Managers and Consultants
- Team Members
- Internal Customers
- Reviewers and Experts

We list these project stakeholders in the approximate rank-order of their potential impact on project success. As most practitioners know, project excellence is much like a chain, where your success is only as assured as the weakest link, or role, in your success chain. You can see that most training companies are missing an opportunity to double or quadruple their penetration in most of their client organizations! It should be clear that strengthening the weakest links can increase training, and improve PM performance.

We know that most of those on the list above will never get a typical, entry-level PM certification. Nor will they attend a 5-day or 3-day class to learn practitioner methods; each requires **different** PM skills.

We have identified the most important IPMA<sup>1</sup> competences for each of these listed roles to learn, practice (there's that word again), and to excel in on the projects in which they are involved. And, we can cite the potential benefits (the business case) of their doing so. Of course, this benefit depends on the organization's culture, industry, core talent development approaches, and other factors.

The chart at the right shows three different groups, or levels, that affect project success. They serve a project best when they focus on *the right project themes*, and they detract from the project when they do not. Which one of those groups do you think should be most concerned with...

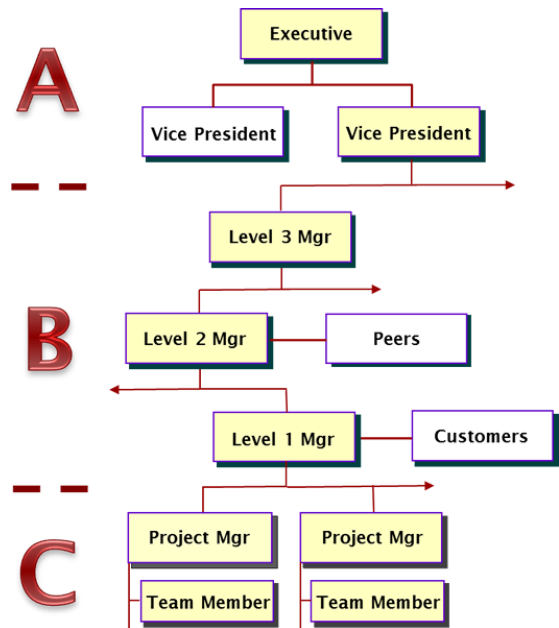
- How/When themes?
- Why/What themes?
- What/Who/Where themes?

These are the results from our Role Excellence studies:

Group A: Why/What?

Group B: What/Who/Where?

Group C: How/When?



And, in most organizations, which group do you think has the greatest improvement opportunity, in role excellence? Our results show it very often is Group B, the “Managers in the Middle.”

In our presentation, we discuss a “Big Oil” company, that had slow decision-making and weak project results throughout many of their organization units. We guided the organization, surveying mid-manager peers, superiors and subordinates, to determine who added value and who did not. Over a three year period, we coached, promoted, and retired 2-3 layers in a 12-layer organization (from line workers to top management), The company doubled their project performance, by focusing on these competences:

- Prioritize
- Assign smartly
- Manage upward
- Develop PPM talent
- Decide quickly
- Communicate well
- Remove barriers

Through a combination of training, coaching, executive support, and the willingness of the participants to help identify how they added value to everything they touched, this company transformed its performance. Of course, one key to this success was executive support, including this mandate: No employee will lose their job, in this project. Those who choose to resume a former position, where they added clear value, can do so, remaining at their current pay scale. This was a massive organizational success.

## E. Overcome Management Complexity

Fact: Complexity has increased in projects and programs. The factors include contracts involving multiple organizations, and multiple decision makers within project performing organizations. Another driver is decreased PM authority, in many organizations—in some cases as a result of prior failures by other project managers. Of course, we all face increased regulatory requirements and enterprise bureaucracy. The consequence: even weaker project performance, in the face of increasing management complexity.

Tools exist to detect and manage this complexity. One example is the asapm Management Complexity Tool, part of the qualification process for their project’s complexity for advanced PM Certification candidates (eg.: Senior Project Manager). asapm’s IPMA certifications require a project of sufficient complexity for the level of certification the applicant seeks. You can see and use this Complexity Tool at [www.asapm.org/certification/what-certification-level/evaluating-management-complexity](http://www.asapm.org/certification/what-certification-level/evaluating-management-complexity).

### What Level of Program Manager Certification Am I Qualified For? Program Management Complexity Evaluation Tool

Use this page to record your sample program’s management complexity rating for a series of characteristics, then review the management complexity score to see the Program Manager Certification you are qualified for.

**Instructions:**

1. For each of the 29 characteristics below, select the option button for the statement that best describes your sample program’s situations.

2. After evaluating all characteristics, review your results at the bottom of the page. It identifies the certification level for which your sample program qualifies you.

Characteristics of Your Programs	Low Complexity	Moderate Complexity	Med-High Complexity	High Complexity
<b>A. Governance complexity</b>				
1. Sponsorship support. This factor covers how well sponsors anticipate and respond to requests for assistance from the program. Sponsors may include both individuals and organizations.	<input checked="" type="radio"/> Consistently strong	<input type="radio"/> Usually strong	<input type="radio"/> Occasionally strong	<input type="radio"/> Seldom strong

This (full name) Management Complexity Evaluation Tool was developed for asapm by William Duncan, who, as many practitioners know, was the primary author of the original, 1996 PMBOK® Guide. The tool has a handful of Complexity categories, each having a few factors that you score on a four-point scale. The categories are:

- A. Governance complexity
- B. Stakeholder relationship complexity
- C. Resource complexity
- D. Project definition complexity
- E. Project delivery complexity

There is a separate version of the Management Complexity Evaluation Tool for programs. These tools have additional uses, in addition their primary use: Smart Sponsors and Managers use them **to reduce management complexity**, thus reducing risk, time and cost:

- Higher Management Complexity requires increased competency in PPMs (primary use);
- Savvy Managers, PMOs, and PPMs also use it to manage the Complexity Factors as risks;
- Map an initiative’s Management Complexity to a qualified project or program manager—one who has earned advanced certifications, such as those from asapm, or other IPMA member associations.

This management complexity tool is just one alternative; but it is a smart one. Too few organizations evaluate management complexity—especially early in the project; but, with this freely available tool, now yours can do so. Of course, even fewer organizations understand the need to match a project’s management complexity to PM talent, or to advanced certifications. It is no wonder that projects of increasing complexity too-often fail to meet expectations—and now you have smarter alternatives!

## F. The Role of Leadership and Soft Skills

The so-called “soft skills” have long been strengths of high-performing PMs, but they are only recently discovered by others. When the 1996 PMBOK Guide was developed, its scope excluded the soft side. Ironic, because our frequent quote, beginning in the early 1980s cited: “90% of project and business success is on the soft side.” Some argue: “The topic is already covered by Human Resources, as part of general management training.” The problem: some aspects of the soft side for projects *differ* from general management practice. **And now**, the project soft side is being proclaimed as “*the next big thing!*”

An added challenge: the soft side is harder to teach, and even more difficult to learn than pm processes—especially for those of us who come from a science-based background. Fortunately, we can overcome the challenges through attention, desire, and good coaching. Group interaction can also improve receptivity. We offer below an example dialogue from our workshops; we also use it in our presentation. One can see how the dialogue can help smooth an introduction to the topic of Leadership.

### A Workshop Scenario

1. Name three examples of Great Managers.
2. Name three examples of Great Leaders.
3. What are the distinctions that caused one group to be easier to name?
4. What are the strengths of the Great Managers you named, that caused you to name them?
5. Can a Manager be Great if she or he is not also a Great Leader?
6. Would You Rather be Managed, or Led?

### Another Approach

Another introduction approach is to use the table at the right, from our presentation. When asked, “What happens if any of the Technical competences are missing?” participants usually say the project will fail. When asked the same question about the Behavioral competences, there are mixed signals and confusion, but eventually most agree that it will fail, or at least fail to deliver the level of success needed.

Technical		Behavioral
◆ Communication		◆ Leadership
◆ Estimation		◆ Sustaining the Vision
◆ Structuring		◆ Emotional intelligence
◆ Delegation		◆ Stakeholder engagement
◆ Scheduling		◆ Cultural acceptance
◆ Change control		◆ Conflict management
◆ Progress reporting		◆ Influence
◆ Closure		◆ Encouraging Innovation

Now that most professional associations have embraced the soft skills, and even those of us with a scientific background accept their importance, there remain many implementation questions, including:

- Which models, instruments, and versions of soft side competences will we favor?
- How do we integrate them into an already full (academic or practitioner) learning curriculum?
- When will they be integrated into pm standards?
- When will they be added to certification exams? (They have been there for 19 years for IPMA.)
- How will we measure their effect on pm performance?

We have only just begun to see the benefits, and need to find answers to these questions to gain more!



## Vision, Innovation, and Lateral thinking

The last Behavioral entry, Encouraging Innovation, on that chart, above is a tough one. Pressures in projects, including deadlines, lack of funding, career risk, and consequences of failure, do not create the right environment for innovation. And yet, Innovation is the entire purpose of project management! This demonstrates the importance of those Leadership and other behavioral competences, mentioned above.



In our presentation, we discuss a Lateral Thinking scenario, based on work by Edward de Bono since the 1960s. We find Lateral Thinking to be a key Innovation strength of high-performing project teams, and is a clear candidate for a Next-Generation PM Practice. Repeating the text on the scenario tee-up slide:

A blind man, alone on a deserted island, has two blue pills and two yellow pills in his pocket. He must take one blue pill and one yellow pill, or he will die tonight. If he takes all of the pills, or two pills of the same color, he will also die.  
What should he do?

Interestingly, different cultures process this exercise differently. For example, a Chinese audience in June was quite different than a Dallas audience in August. To continue the scenario, here are a few Sample Solutions (note that Lateral Thinking offers multiple solutions, rather than One Right Answer):

- Cut all pills in half; eat just one half of each.
- Empty or grind all pills; eat half the pile.
- Leave the pills in the Sun; the blue pills should be warmer on a hot day.
- Does he have a cell phone and a connection?

## G. Align Projects & Strategy

I entered pm consulting with a strategic planning background. But often, in the early 1980s, when I asked Executives to share their strategic plans, so I could help align the projects and programs in their portfolio, I saw embarrassed looks around the table. They did not have one. In some cases I actually had to help them to develop enterprise or business unit strategic plans so we had all the factors needed to perform portfolio prioritization. Fortunately, over the last 30 years, this situation is improved.

At least the situation is improved in business—but not all professional associations have realized its importance. For example, according to some, programs should support the strategy, but for projects, it's not necessary. No wonder people who follow this mentality have problems prioritizing their projects so they can staff and fund them correctly! Top performing teams use strategic alignment as a prioritization and risk consideration for projects and programs. Without this directive, many projects suffer.

One challenge for many project managers is that they focus on the middle-late part of the life cycle. This causes them to be somewhat blind to the “fuzzy front end,” where all the strategic issues should be sorted out—on project and programs. Another challenge: an attention to detail, often driven by that fear, risk and pressure mentioned earlier, blinds them to the big picture, crippling their ability to envision.

This often shows up in a lack of creative and innovative alternative solutions during Design. Of course, some will say that this strategic alignment is not the PM's job. Then whose job is it?

In our presentation's Case History for this section, we explore a scenario of a major Health Insurance company (one of the Blues), that had an excellent Strategic Plan, developed by their Executive team. But the company had failures in implementing the strategy. Among their observed challenges:

- Projects had no strategic alignment;
- Middle-managers did not understand, or buy in;
- Priorities were set by squeaky wheel, not alignment;
- Projects consistently fell short of expectations.



We established a Strategic Learning series for the middle-managers. Among our alignment actions, we:

- Engaged middle managers in reviewing the Strategic Plan;
- Assigned responsibility for mapping their departmental initiatives to the plan;
- Assisted them in identifying key performance indicators for their initiatives;
- Established mid-manager responsibility for success in projects “touching” their area;
- Set measures and mechanisms for rewards and rewarded performance.

**The outcome:** They grasped the connection between the Strategic Plan, their projects, operations, performance, and rewards. And, they delivered results, with needed executive support. Case closed.

## Summary

In this paper, we discussed seven Take-Aways—longstanding practices of top-performing teams—that form the basis for many of the next-generation “innovations” that our practice is, or will be, embracing. We included insights about the true nature of PM Best Practices, of the importance world class practice—just as important for PM as in sports. We exposed the secrets of adapting methods to project size, and the most important roles to develop for improved performance. We introduced tools for evaluating, and ideally, eliminating management complexity, and highlighted the belated discovery, by some (certainly not our readers!) of the importance of the soft side. Finally, we asserted the need for alignment of all projects with business strategy—after all, project managers are change agents!

Organizations, or project teams, that embrace and apply these insights have the potential to massively improve project and business performance. And how do we know? Because in our company, we have spent over 35 years applying these and other insights, to help organizations improve their measured pm performance by 200%, as mentioned in the presentation, and by up to 1000%, as audited by one client's auditors. And note: none of these performance improvements involved more training of project managers, or new automated tools. Instead, they came from executive support of the insights shared in this paper. Plus great project managers, sponsors and teams, of course. Thank you for your engagement!

**An onsite presentation is available that supports this paper.**

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A member of PMI®, since 1983, Goff is also co-founder and past-president of IPMA-USA, and was Vice President of Marketing & Events for IPMA®, the International Project Management Association, 2011-2014.



An insightful consultant and dynamic speaker, Mr. Goff provides program and project consulting, training and coaching services. He presents at major industry conferences, and offers workshops of interest to Executives, Managers, Program and Project Managers and leaders, technical staff, and individual contributors. By 2000, he had exposed over 45,000 people to Project Management. Today, his tools and methods are used by government agencies, Enterprises, consultancies and individuals on six continents.

## Application Areas

Topic is universal, with special benefit for IT, New Product Development, and Telecommunications.

## Key Words

PM Practices, Project Size, Leadership, Interpersonal Skills, Management Complexity, Strategic Alignment; Innovation; Organizational Change; PM Audiences.

## References

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<sup>1</sup> IPMA, the International Project Management Association, is the world's first professional PM association.

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