

Sizing up the Settings in Project Management

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If successful projects are required for companies to survive and prosper in increasingly challenging times, what does it take to make that happen? Is it a question of restructuring the company, implementing new systems, or bringing about a new mind set with the people involved? Or is it a combination of these factors melded with other influences from the marketplace and new technological developments? Where should you start making improvements? What actions will have the most punch?

The answer resides in a mosaic of approaches, some of which make sense in certain settings and may not in others. Here are some classic solutions – approaches designed to help spur projects onward to timely, effective and efficient completion. The degree of success depends on the ability to custom fit the solutions to the challenge at hand and on the ability to deal effectively the following factors:

- Context
- Organization
- Processes and Systems
- People.

Each of these items needs to be assessed to see where the organization stands regarding the art and science of managing multiple projects. In this article, the up-front issue of context is examined.

The Size Up

An overview of how the company sizes up on project management practices can be obtained by carrying out a maturity assessment. This highlights where the company is up to par and also pinpoints areas for improvement. Several models are available, ranging from simple questionnaires aimed at compliance with the PMBOK Guide to multiple-tier approaches as outlined in PMI’s OPM3 – Organizational Project Management Maturity Model. The alternatives range from simple to complex, and involve varying degrees of effort as well as quality of results.

Once the approach is chosen, *buy in* by players at several levels within the organization is essential. Upper management needs to believe that the maturity assessment is a significant step towards improving overall results. For this group, the “selling” discourse is aimed at boosting the “bottom line” and achieving company goals. For middle management directly involved in managing project managers, an appeal towards “improving project management methodologies and practices” strikes a sympathetic note. And for those in the trenches of project work, if they perceive the maturity assessment as an opportunity to speak to the problems they face, they become interested in participating in interviews and surveys.

Of course a maturity assessment in itself doesn’t improve performance on projects. It does however shine a spotlight on what needs to be done to upgrade results in the

company's project portfolio. A maturity assessment creates awareness and a sense of urgency to tackle the relevant issues in the key categories that influence success in project management: context, organization, processes and systems, and people.

The Context

Context is the backdrop against which the three giant project management gears (organization, processes and systems, and people) must mesh and move in harmony with one another. Depending on the context, the relative importance of one factor to another varies. For instance, in a setting of multiple projects of a high technology corporation, an internal umbrella organizational group (perhaps a project office) charged with developing and implementing processes, systems and people might be a key success factor. On the other hand, for a stand-alone capital expenditure project with little interface and relationship with the rest of the organization, having on board a few hero-like key players with solid experience might be enough to take the project to resounding success levels. In like manner, for a project with teams spread around the globe, as in the case of a new aircraft with pieces detailed and crafted in different countries, the processes and project communications systems may be the strongest success factor.

In most contexts the relationship between the three factors is highly complementary. In spite of differing schools regarding the importance of one to another, most projects avoid stumbling blocks when equal emphasis is given to all. A lopsided approach tends to set off disasters, much like having too much weight on one side of a rowboat. Here are examples from differing schools that tend to "tip the boat." The first train of thought believes in a technical approach -- that a logical organization structure and appropriate processes and systems are enough to guarantee success on projects. In this case, the importance of the people factor is overlooked (selecting, training and motivating professionals and building a team.) This technical approach is based on the belief that "organization and process make people perform effectively." The opposing view, which over emphasizes the human factor, makes the boat list in the other direction. It assumes that people are the most important factor and that "people make the organization and processes work." Balance of course is the key to keeping a boat afloat and to carrying out projects successfully. So substantial attention must be given to each of the technical factors of organization, processes and systems, as well as to the people issues.

So understanding the context is a major factor for achieving success on projects. This calls for a survey in the kick-off phase that outlines and describes the overall setting in which a project or series of projects, is to be carried out. This includes evaluation of items like cultures, languages, prior experiences, technological complexity, criticality ("do or die"), basic project assumptions, political climate and stakeholder profiles. That evaluation photographs the setting in which a given project is to be carried out and serves as a basis for determining the criteria for organization.

It takes the other critical success factors (organization, processes and systems, and people) to be able to build an effective project management machine. Yet understanding the settings of projects is a fundamental starting point. In this way, the critical success factors can be customized to the particular situation at hand. Sizing up the setting at the outset can mean the difference between getting a project off on the right foot or having it wander aimlessly off course.