



Are you a Project Manager/Leader or Just Managing Projects

Alan Peterson; C.J. Walker, PMP

The "Expert Series" is a collection of articles, papers and writings by PM Solutions' associates that provides valuable insight into the Project Management Industry.

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OVERVIEW

PROJECT MANAGEMENT IS A DIVERSE PROFESSION that transcends all industries. The essential concepts of project management application are consistent across the board. Given the trend toward a globalized and projectized environment, the role of the Project Leader takes on increased importance in corporate success. Therefore, it is important to recognize and understand what makes an excellent Project Leader. A true Project Leader will be someone who has a drive for excellence and a commitment to the professionalism of project management.

Many people can follow the tools and techniques used in project management (i.e., develop scope, a budget, a schedule, set-up quality metrics). However, we must determine if we are willing to settle for an average project manager (either by design – meaning that an individual was placed in a position without having the right character traits, skills, and training to perform the job successfully, or by consequence – meaning that the individual is just an average performer in any position, but has acceded to this position of leadership) who only applies project management tools and techniques as if they were following a book of instructions. Or would we rather develop exceptional Project Leaders who have insight into enhancing the process, an ability to leverage experiences, and a great leadership style?

Managers initiate, administer, and maintain; leaders originate, innovate, and take great risks at high speed. The good manager keeps an eye on the bottom line and knows the cost of everything; the good leader keeps an eye on the vision and knows the value of everything. The manager improves the efficiency of the status quo, asking how? and when?; the leader challenges the status quo, asking why?...One characteristic in particular is required of today's leaders: they must thrive on change.¹

Although understanding the concepts, tools and techniques is important for everyone (all project participants and the customer), not everyone has the potential to become a great Project Leader. Therefore, we should provide general project management education to everyone, but only mentor those with a desire and potential of becoming a great Project Leader.

This paper covers why the authors feel many companies are in a position of having individuals who are just managing projects – rather than true Project Leaders. In addition it identifies some of the requisite character traits and skill sets that a successful Project Leader should possess and how an organization can best utilize their resources to ensure that the right type of individuals are leading projects.

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THE CORPORATE NEED

A “Warm Body” Concept

More and more, the successful business is the one that can quickly and effectively react to a rapidly changing marketplace. It must be able to respond to its competitors’ challenges in the market. This means it must be able to change rapidly and to manage that change in such a manner that there are no downstream reverberations, thereby quelling the effectiveness of the change.

These changes are effected by means of projects – the business endeavor having a specific start and end date, producing a specific set of deliverables (changes), and consuming a predetermined number of corporate resources.

Project management continues to become more challenging and we think this trend will continue. This means we have to pay special attention to the development of project managers who are capable of coping with jobs that range from small to mega projects and with life spans of several months to ten years. At Fluor, a project manager must not only be able to manage the engineering, procurement and construction aspects of a project, he or she must also be able to manage aspects relating to finance, cost engineering, schedule, environmental considerations, regulatory agency requirements, inflation and cost escalations, labor problems, public and client relations, employee relations and changing laws. That’s primarily on the domestic side. On international projects, the list of additional functions and considerations adds totally different complications.²

It becomes obvious then, that project management is as much an art as it is a science. The science aspects of Project Management include such areas as: planning, WBS techniques, creation of Gantt charts, setting and adhering to standards, creating CPM / precedence diagrams, performing variance analysis, doing earned value analysis, ... and the beat goes on. These are tools and techniques that can be learned, practiced, and honed. All that is required is the interest and ability to learn.

But project management as an art includes such diverse areas as: effective communications, trust, integrity, honesty, sociability, leadership, values, flexibility, decision making, perspective, sound business judgment, etc. How does one learn trust, honesty, decision making? True, there are thinking patterns and certain analysis techniques that can assist in some of these areas, but basically one *has it*, or one *doesn't have it*.



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True story:

I had a friend in high school (let's call her Sandy) whose mother aspired for her to play the clarinet. Sandy had taken clarinet lessons each week for a period of over 8 years; her mother had seen to it that Sandy practiced at least five hours each and every week. So Sandy had had about 400 lessons, and had spent some 2,000 hours in practice. I literally watched people cringe when Sandy tried to play clarinet solos. Could she play the notes? Yes! Could she make music? No!

On the other hand I had another high school friend (call him Bob) who picked up the clarinet at age 9, never had a lesson, but just had a "God-given ability." When he played, people responded positively and enthusiastically. Interestingly, given that he had not had lessons, he always envied Sandy's technical skills. Could he play the notes as well as Sandy? No! Could he make music? You bet!

So what was the difference between Sandy and Bob? Whereas Sandy had all the training, mentoring, and experience one could want, she lacked the one ingredient that Bob had: the innate traits that make up a musician. One can take violin lessons for years and can practice untold hours, but an Itzhak Perlman is *born*, not *developed*.

One of the age-old questions in psychology is whether the "nature" (genetic make-up) of an individual or his/her "nurture" (environment) is the more important determinant of that person's personality. This question has particular interest when applied to the Project Leader. Project management is a diverse profession that encompasses all industries. There are a number of techniques aimed at developing excellent Project Leaders (e.g. training, mentoring programs, experience, etc.). Whatever set of techniques is selected for an organization's project management improvement program, there will be a considerable expense involved in the process. It is therefore only prudent for that organization to take whatever steps are necessary to improve the success rate of the program. One such step is to start with the right "raw product" - that is, to develop the right people. How have we gotten to the point where the question of selecting the "right person" even has to be considered?





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Kerzner³ suggests that the history of project management can be divided into three periods:

1960-1985: Traditional project management

Project management was dominated by contractors in aerospace, defense, and large construction. Although improving profit levels was the prime motivator for projects, the project teams were very large, all members were 100% dedicated to the project, cost / schedule were secondary to technological development, and project managers were almost certainly chosen from the ranks of the technicians. Many large projects were publicized which were completed years behind schedule and 200% to 300% over budget. Obviously companies in other industries adopted a "wait and see" attitude; project management gained very little acceptance.

1985-1993: Renaissance of project management

Slowly, corporations in other industries began to recognize the advantages that project management could bring to them – not only could it facilitate change, it could actually improve profitability! Project management now began to be applied to all sizes of projects – even the functional areas of the business recognized its impact. Multidisciplinary (read matrixed) teams became somewhat common – it was proposed that project management as such was an emerging skill, or profession. Personal computers based Project management software gave an ever widening audience access to more sophisticated planning / scheduling tools.

1993-present: Modern Project management

Organizations were now recognizing significant changes in qualitative and organizational aspects of project management. This came about as more organizations developed some degree of competence (and perhaps confidence) in project management, and wanted their clients, employees, and stakeholders to recognize the value of the improvements. In all kinds of industries, modern tools and techniques in support of projects have grown increasingly sophisticated. No longer is project management confined to those businesses that are inherently project-driven, but has spread to virtually all areas of business. Project management is now firmly recognized as a profession, and career paths exist for professional project managers.



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Unfortunately, many companies have not evolved and developed their project management expertise along the above “flight path.” Many of their competitors are in the “modern project management” era, whereas their own paradigm is one of the earlier two eras. They are playing catch up. They have more projects than managers. The most natural thing to do is to draft the person with a good reputation with the organization to lead the project. Generally this person is a good technician or a good administrative manager.

The next step? Orient, train, mentor, train, give them experience, train . . . Does this begin to sound a bit like Sandy, the aspiring clarinetist? In many cases, only with blind luck does an organization get a person having the right aptitudes into the project management development program. Counter to the popular quip – better *good* than *lucky*!

It is apparent that there is a set of attributes or characteristics (*character traits*) possessed by leaders – that is possessed by those that have the best chance of becoming excellent Project Leaders. Although understanding the concepts, tools and techniques (the *skills* of project management) is important for everyone (all project participants and the customer), not everyone has the potential to become a great Project Leader! Therefore, we should provide general Project management education to everyone, but *only develop those with a desire and potential of becoming a great Project Leader.*

As with musical ability, these character traits are all part of the person’s value system, his/her natural God-given attributes, and talents. Possessing them provides one with a “ticket to play” in acquiring the skill set for project management.

A BETTER SOLUTION

The “Right Body” Concept (Instilling skills in the right people)

In order to create a mutually successful corporate environment it is important to create an environment for success by putting people into positions to succeed. Not everyone is destined to become a project leader, any more than everyone is destined to become the CEO. Projects are a team effort, and in any team initiative all team members serve a valuable role. There is a need for Project Leaders, Project Managers, Technical Leaders, Project Team Members and Stakeholders. The corporation must acknowledge the value of all these roles and target professional development programs, training, and mentoring as appropriate.





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As we have defined before, there are distinct role differences between managing and leading. However, a leader must be able to do both, whereas a manager need only be proficient in management tactics. Given this logic, most often managers in the organization become the target pool for potential leaders. So, what does one look for in a potential Project Leader?

As noted above, we need to identify the “character” traits and the base set of skills that contribute toward project leadership. We can then develop the skill sets to complement those traits in order to enhance success in project leadership. For example, a leader needs to:

- *Be Adaptable and Innovative.* This goes beyond the nature of man to be adaptable to his environment. In order to be successful, one has to be adaptable to change by embracing change and leading others through the transformation process. One can become an inspiration by the flexibility one portrays in finding creative solutions to a changing environment. To do otherwise is a disservice to the project team, left struggling with a new environment alone.
- *Have a Facility for Learning.* Everyone enjoys taking a class and learning something new. Not everyone embraces this new learning and applies it. One must be self-motivated and innovative in the way one changes their thinking by approaching the job from a new angle. Given that project management crosses all industries, one has to be able to absorb – in a short time frame – the nuances of each industry to which one is exposed and to grasp the new technologies that one may encounter.
- *Be Decisive and a Problem Solver.* This does not refer to rash decision making, but rather once one has 40-70% of the information, one makes a decision and goes forward. A good project leader would also have a contingency plan and an ability to refocus the group, should that decision prove wrong. Being decisive means one is not afraid to make a wrong decision. If one doesn't make a decision then life makes it and control is lost. Being a problem-solver means finding creative methods for discovering new solutions. Finding obstacles a challenge instead of an overwhelming situation is the sign of a good Project Leader.





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However, character traits are not enough, they are merely the raw material from which a masterpiece can be derived. In addition to character traits, a base level of project management related skills is required. For example, a good Project Leader should:

- *Be a Good Communicator.* We all propose to be great communicators – or gossip mongers, as the case may be. However, the art of being a great communicator is one who has the ability to listen to the ideas and concerns of others and to work toward “win-win” solutions. This is one of the core concepts of team building. A good communicator understands what is important to his/her project team, customer, management. S/he learns how to “speak their language”, whether that is a detailed explanation or just the high level facts. It is also important to determine the most effective means of communication (face to face, voice mail, email, written reports, etc.) and when these various should be used.
- *Be an Accomplished Motivator.* Most people would like to see themselves as a motivator, however use of purse string authority (authority to grant financial gains) is merely a carrot at the end of a stick and is not a long lasting motivating technique. As a Project Leader one must consider the needs and motivational factors of the team. In this we mean a Project Leader must take a genuine interest in developing the skill sets of the project team, encourage team members to make mistakes and grow, and show overall support for team member decisions. (Note: even if the decision is wrong, it can be reversed. However, berating an individual for having the courage to make a decision will ensure that individual will be “gun shy” in the future, and fear is a terrible position from which to make a decision.) A true Project Leader will encourage and not fear the team’s development and skill set growth.
- *Be Multi-tasking with a Broad Knowledge Base.* For many people it is difficult to focus on more than one thing at a time, successfully. However, that is exactly the requirement for a Project Leader. The job description requires operating on different levels and having the foresight to know that once a task is completed, another is in the cue to start immediately, with no down time. The ability to organize one’s time is a key attribute to multi-tasking. A true Project Leader is not only a good multi-tasker, but prefers this mode of operating. With regard to a broad knowledge base, although one is not an accountant, a project leader needs a fundamental understanding of finances; s/he may not be a systems engineer; however, the project leader needs a fundamental understanding of the functionality of the systems, terms and concepts.





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One of the techniques that is most valuable in determining appropriately skilled resources is that of job expectations. These go beyond the general description of tasks (which should be considered an outline of general expectations, not a limitation of activities) to the results of the role. As we become increasingly global in our business endeavors and project orientation becomes the more common approach to work efforts, people and efforts are judged by the results. Just as we determine the acceptance criteria with a client for a project, we need to define the acceptance criteria for the individual by clearly communicating the results expected. In this way they understand the standards by which they are being measured and can take active steps toward becoming successful within their own eyes, as well as that of the corporation.

BRIDGING THE GAP

Defining an Action Plan toward Effective Resource Utilization

In the previous sections we have discussed the problem (the “Warm Body Concept”) and the goal (instilling skills in the right person). How do we get from our current state to our desired state of enhanced productivity and results?

We would submit the following as the “project plan” for this very important effort:

- 1. Assess Organization** Measure the current state of project management Maturity within the organization.
- 2. Select Leaders** Measure the character traits and skills of those people interested in pursuing a Project Management career with the organization.
- 3. Specify Objectives** Determine the specific objectives for project management improvements, both for the organization and for each person to be developed as a Project Leader.
- 4. Transition** Document the change / transition plan to get from here to there, and make the transition.





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Assess Organization

The goal here is to measure project management skills and practices of the organization against a project management standard. This begs the question: what standard? At PM Solutions we have developed a project management maturity model, much like the Systems Engineering Institute's Capability Maturity Model (CMM). With this project management maturity model in hand we can now assess an organization's project management skills and practices, and "plot" them on the model. This enables the organization to understand where they are functioning in several key areas, determine where they really should be, and devise a plan to get there.

Select Leaders

We have laid a solid foundation above for the fact that there are a set of characteristics and a base set of skills that are necessary in an individual if s/he is to become a leader, and not merely a manager. Much as with an organization assessment, we have devised an appraisal vehicle which measures these characteristics and base skills at an individual level.

The organization needs to take a very difficult stand: not all the people having an interest in project management should be developed in that direction. Rather, only those people having the appropriate characteristics and base skills should be trained / mentored.

This stand will be controversial and must be handled with much tact. It is akin to a best friend telling you that your lipstick is badly smeared on the left side (which has a high probability of happening just after that important presentation to the CEO). Your friend has earned the right and responsibility to share bad news as well as good news. In the same way, the organization has the right and responsibility to partner with an individual in assessing his/her characteristics and base skills and in creating a career progression plan. The organization must realize it is doing the individual a great service in being forthright about the likelihood of success in their career goals.

What does the organization achieve by taking this controversial approach? By doing such an assessment for all those in the "project management pool" the organization understands which of these individuals should be in the pool. In addition, by administering such an instrument to others not yet in the pool, it may be possible to counsel them regarding the possibility of project management as a career direction. The organization will now be in a position to develop leaders.





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Specify Objectives

Having determined the organization's current project management state and targeting those individuals who have the potential for true project leadership; we must now define the future project management state for the organization and the future for the individual. Our assessment vehicles are specific and objective, and provide for achieving higher levels of excellence. Objectives should be specific, measurable, achievable, realistic and time related. An example might be a goal of having projects which meet the triple constraint parameters 90% of the time or 50% of the project managers/leaders within the organization are PMP® (Project Management Professional) certified.

Transition

With the current and future state of the organization and individuals determined, we now need to manage this change and transition initiative in the same way we would manage a project, by putting together a project plan and managing to that plan. It is important to recognize that in any change and transition effort there will be resistance, which is a normal human response. Understanding why people are resisting change and creating measures for buy-in and commitment and keeping the vision at the forefront are critical success factors. With regard to the buy-in factor, everyone wants to be on a winning team – thus identifying “quick hits” by piloting new methods, approaches or individuals is a good means of showing what the future state may resemble, thus minimizing resistance and concern. The project plan also serves as an excellent communication tool so that the project stakeholders understand what will occur when and what is expected of them throughout the process.





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Rules for Successful Project Management Transition of the Organization and People
Going from an organization with individuals who just manage projects to one of project leadership is fundamentally a change and transition effort for the organization and individuals. As such, recognizing the success factors for organizational culture change is important to ensure long term success. The more closely that a structure is followed, the greater the chances for successful implementation.

- Become a learning organization. Embrace new ideas, new concepts, new techniques, and make them available to everybody.
- Establish clear communications processes and media.
- Record and praise accomplishments and heroes who support and demonstrate the concepts required in the new culture.
- Establish a flexible, central structure which provides a critical core for all implementation efforts.
- Accept risk and proceed judiciously. Strive to extend the culture throughout the organization, despite the inherent risk of change.
- Know and publish boundaries for the culture. Ensure a common understanding of what the culture is intended to be, and what it isn't.
- Evaluate and prove the economic value of the culture.
- Involve everyone.

¹ Moravec, Milan and Richard Manley, "Reinventing Leadership," *PM Network*, September 1995, pp. 15-18.

² Fluor, Robert J. "Development of Project Managers", keynote address to the Project Management Institute, Ninth International Seminar Symposium, Chicago, Illinois, October 24, 1977.

³ Kerzner, Harold. *In Search of Excellence in Project Management*. New York: Van Nostrand Reinhold, 1998, pp. 94-104.