Transforming project management while respecting our diversity

Abstract

The leading project management associations have existed since the 1950s. Also, many guides and professional certifications have been around for decades. Yet, the project management failure rates have been stagnant. Further, we still lack a common or shared definition of project success or what constitutes a project management method. However, we continue to debate agile, waterfall, and hybrid; the irony is that neither is a project management method. In addition, many organizations launch PMOs only to shut them down later. Consequently, we must take a hard look at our work and the PM state of practice and transform it. In this paper, we offer one approach that helps in this endeavor.

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Introduction

The leading project management associations[1] have existed since the 1950s. Also, many guides and professional certifications have been around for decades. Yet, the project and project management failure rates have been stagnant[2].

In our current state, we still lack a common or shared definition of project success. We do not know what constitutes a project management method or the difference between methodology and method. However, we continue to debate agile, waterfall, and hybrid to determine the best PM Method. The irony is that neither is a project management method.

In addition, many organizations launch PMOs only to shut them down later. Why? Lack of understanding of what a PMO is, a clear mandate, genuine sponsorship, or improved portfolio performance. Today, we might have 49 varieties of PMOs, and frequently we hear about a new flavor or name.

Consequently, we must look hard at our work and the PM state of practice. It may be time to transform project management.

It may be time to transform project management

We in Uruk Project Management are on a mission to be one of the leaders in this transformation journey. We center our effort around two areas. The first focus is on organizational project management, which includes the need to elevate PMOs to a formally recognized project management core function[3]. The second area of focus is to advocate the need for integrated project management (and ultimately integrated portfolio management). This paper presents our approach that helps in this second area of focus. Finally, in support of both areas, UrukPM has been developing the Uruk Platform, a pioneering, comprehensive, and versatile digital solution[4].

Points to ponder

There are numerous software tools branded as "project management software." However, most of them are about task management, and some might include timesheet management, collaborations, and other basic functionalities. Other tools might be sophisticated but limited to

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[1] For example, the International Project Management Association (IPMA®), the Project Management Institute (PMI®), and others.

[2] A disclaimer: Unfortunately, we do not have standard definitions of project success (or failure) or how to distinguish between project and project management success/failure. Further, most of the studies that exist use different methods and reference points, which contribute to the need for more credible sources.

[3] We will address this topic in another paper.

[4] The Uruk Platform's initial solution is already active and in the market for clients to try and subscribe to. Please visit our website for more information, https://urukpm.com/project-management-uruk-platform/.

certain functions like scheduling, cost, or risk.

On the other hand, we have guides like the PMBOK® Guide (and others) that often limit project management to technical project management[5]. Technical project management is when a project starts after the market and business analysis is completed and ends with delivering an output. *In other words, project management is often not visible in the early stages of a project, and project managers are not engaged in organizational change management and operational readiness activities.*

The reality, backed up by studies from various organizations, including PMI, shows that we have more failures than successes. *Why do projects fail despite years of professionalism in project management, millions of certificate holders, and numerous certifications from a few associations?*

> *Why do projects fail despite years of professionalism in project management, millions of certificate holders, and numerous certifications from a few associations?*

As a community, we have not identified and addressed the root causes; instead, we often get lost in the symptoms. However, the author believes the root causes are:

- **The absence of organizational project management systems and methods,** and
- **The lack of focus on delivering value through a methodological process.**

Both points are related to the UrukPM mission highlighted in the Introduction.

This paper

We start by repeating the purpose of this paper. The objective is to promote the idea that we must shift our focus from task and technical project management to emphasizing a value delivery model. In this context, the model is a **value-delivery methodological process**. This process is fundamental for organizational project management, where **organizations lead projects from the idea (vision) to the market to initial operations, PLC closure, and ultimately objective success[6]**!

Consequently, this would be about building an OPM system and methods with the three foundational pillars of people (competence), processes (methods), and tools (technology)[7].

The author has dedicated years of his career to building and enhancing this model. He has published numerous e-books[8] and books on the subject. One reference was his book **Project**

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[5] This is a term that is not commonly used in the community. However, the author uses it to emphasize a vital point.

[6] Although this approach suits many projects, it most applies to project owners' organizations.

[7] A relevant video, https://www.youtube.com/watch?v=zl41HoxV3oA&feature=youtu.be

[8] For the e-books, please refer to this page https://urukpm.com/project-management-books/.

> *A value delivery methodological process is where organizations lead projects from the idea (vision) to market to initial operations, PLC closure, and ultimately objective success!*

Management Beyond Waterfall and Agile, published by CRC Press in December 2017[9].

Further, the author is also the founder of Uruk Project Management (UrukPM), a Tech Startup. UrukPM[10] is building the Uruk Platform[11], a digital solution for **Integrated Portfolio Management**, including the digitization of the OPM System and the **Value Delivery** model.

Respecting our diversity

In writing this paper, it is critical to highlight a few vital points to ensure alignment and avoid misunderstanding. **We know that the project management domain is essential for organizational success**. However, it is often misunderstood and lacks the proper recognition by executives. As a result, many organizations have not invested in building their OPM systems or methods. Some organizations might have a system but have yet to adopt digitization and digital transformation. Consequently, we see projects and project management[12] failures happening too often.

> *Lack of proper recognition → Lack of OPM systems/methods → High rate of projects/project management failures!*

Unfortunately, various guides offer us generic project definitions but with different interpretations depending on the context. Many of us often joke that the answers to most project management questions must start with "It Depends[13]," and there is a good reason for this.

For example, when we define a project and project management,

- Do we distinguish between projects for a service provider versus a project owner?

- Do we include the question of size and complexity in the project definition?

- Can we understand that managing a small and straightforward project requires a different

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[9] https://urukpm.com/project-management-books/

[10] https://urukpm.com/

[11] For a trial plan to the Uruk Platform, please start here: https://urukplatform.com

[12] Notice that we separate project failure from project management failure; for more information, refer to Four Dimensions of Project Success™ - Applied Project Management (urukpm.com).

[13] This link https://www.youtube.com/playlist?list=PLiXup1IJ-_TMd4xVfSot7lnvMpvn8X_N5 is to a series of videos on the theme of "It Depends"

approach than leading a large and complex one?

- Have we realized that most projects might share a set of processes, but a project management method should depend highly on the project type, size, and complexity?

- Speaking of methods, do we genuinely understand what a project management method is and the components of such a method?

- When discussing PPM tools or PM Methods, are we aware we might be talking about task management, stage management, or technical project management and labeling them, mistakenly, as project management tools or methods?

The rest of this paper is in two sections; the first addresses the current reality (gaps), and the second offers our suggested solution.

The current reality (gaps in practice)

Disclaimer

We cannot generalize. In some organizations, the gaps could be significant, with severe consequences. On the other hand, some organizations might only have some of these gaps. Finally, a few organizations might be performing as leaders, where project management is a competitive advantage!

Our aspiration:

Achieve a level where project management is a competitive advantage. Where project management is indispensable for organizational success.

General Comments

Here are a few general comments:

- Despite the professional associations' value, we hypothesize that there are still gaps in project management practice, causing too many failures.

- Practitioners still struggle to apply what they learn to real-world projects.

- We realize that certain concepts apply regardless of industry or domain. However, other variables are highly unique to the context of a given project.

- Based on observations and studies, we know that organizations with good project management maturity have developed their OPM systems and methods.

- On the other hand, some organizations still depend on accidental project managers or outsourcing. These organizations execute projects through accidental project managers, then wonder why the failure rate is so high.

- Some organizations think that they are delivering the project successfully; this might be so, but are they using explicit criteria for measuring project success?

A focus on task management and stage management

When organizations lack well-defined systems and methods, they depend on accidental managers. Without the necessary guidance, these PMs manage tasks rather than a holistic focus on the entire project.

With the help of OpenAI for a definition of task management:

Task management is the process of managing individual tasks and assignments within a project (or, most often, within a stage). Task management is important to ensure everyone is on the same page and that work is completed efficiently and effectively.

Is this OK?

It Depends!

If the project is small, with a few resources and a short duration, or a stage within a more significant project, then task management might be enough. In these cases, using task management tools available in the market could work well. However, if the project is substantial, **would not task management lead to losing sight of the forest from the trees?**

Technical project management

What is technical project management?

According to ChatGPT, *it involves overseeing the technical aspects of a project, such as software development, hardware engineering, or system implementation. Technical project managers manage the technical resources required.*

However, our definition is broader.

We use "technical" in the title to imply that project management focuses primarily on delivering an output. In other words, project management and managers are not typically involved in a project's business discussions or discovery phase before initiation. Further, they are not likely to be involved in operational readiness or initial operations. Finally, they are not responsible for the outcome and benefits realization, among other things. In this scenario, the project life cycle starts with a project charter and ends with delivering the output/closure; *refer to Figure 1*.

This style of project management is the most common practice today. The challenge with this approach is that it indirectly (or directly) encourages organizational silos since a project is handed over from organizational unit to another and more than once during its life span[14]. As

Figure 1: A typical project life cycle that aligns with technical project management

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[14] At least from the business side (initiator) to the project management side (implementer), and again, from the

a result, we do not have integration of project management within the other critical relevant business units, such as strategic or business planning and operations.

Process groups versus project phases

Another critical gap in practice is the confusion between the process groups and the project life cycle. The cause of the confusion is not an error in guides like the PMBOK® Guide or ISO 21500[15]. Many practitioners and students of project management **misunderstand** these guides, and they apply what they believe they understand, which results in less-than-optimal solutions. An example of this situation is what we show in Figure 2.
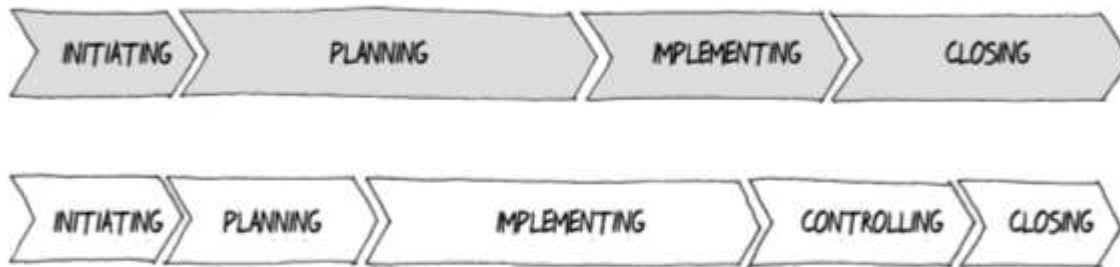

Figure 2: How some practitioners of project management understand the project life cycle

These practitioners do not recognize two fundamental facts:

- The process groups ARE NOT project phases.

- These process groups repeat in every stage[16].

Unfortunately, the situation is not limited to individuals; even some organizations label their projects' phases after the process groups. They think this is the PMI Way, and unfortunately, some consultants offering PM and PMO services do not know the difference or correct their clients.

The issue is different from the names and terminology. It is fine with whatever names individuals and organizations use for their project phases as long as they understand that a **planning phase** differs from the **planning processes**. The **implementation phase** is not the same as **implementing processes**. This vital distinction will have positive consequences for project performance.

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project management side to the business (operations) at handover. Further, some projects could have additional interfaces, for example, owner to contractor, engineering to construction, etc.

[15] We realize that the latest editions of these guides are evolving. Therefore, current content could be different than what we present here.

[16] In the context of this paper, we often use the terms phase and stage interchangeably.

Agile, agile, and agility

Another area for improvement is the confusion between Agile, agile, and agility. Although this topic requires a dedicated paper, we discuss a few points here.

- Agility is a necessity in organizations and on projects. However, agility is about being flexible, dynamic, and responsive to change. When we say an organization is agile, that would be agility. Therefore, agility is not about project management methods, although it is valuable for projects!

- Agile is one of the most controversial topics today, with many Agile practitioners referring to themselves as Agilists or Agile Evangelists. The challenge is that these Agilists keep bending the definition to whatever suits them, even making false or unsubstantiated claims. In our view, Agile is also not about project management methods. We restrict our view of Agile to the Agile Manifesto for Software Development, where Agile is about software development or product development, not management.

Agile is not about project management and it is not a project management method. Agile is either about agility or agile development, we must offer a clear context!

Projects and project management failures

Unfortunately, to our knowledge, none of the PM professional associations clearly define project or project management success (or failure). Without definitions, criteria, and scale, we end up with too many ambiguous reports and statistics that might not make sense. For example, some research on capital projects[17] shows that only 0.5% are successful. Another study from another organization indicates that success could be as high as 60%. Another reference classifies projects as successful, challenged, or failed.

Why the discrepancy?

Lack of definitions and criteria.

There should be another paper on this topic. However, let us limit our discussion here to state that numerous references, studies, surveys, or analyses tell us that failure is too common.

Despite the 60+ years of professional associations' presence, numerous guides and standards, hundreds of PPM tools, and millions of certificate holders, we still find that failure is too

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[17] Capital Projects, also known as Capital-Intensive Projects and, in some references, Construction Projects. These projects often involve building an asset or facility the owner will own and operate to generate value. They typically require significant capital investment, often in millions or even billions.

common. Sadly, many do not know or agree with the root cause(s).

Project management methods

We close this section with one of the most critical gaps in practice, the confusion on project management methods—the too-frequent debate on waterfall versus agile, direct results from this gap. Let us state our professional opinion here, knowing it is controversial:

- Waterfall is not a project management method; it is not logical.

- As mentioned earlier, Agility and Agile are not project management methods.

- Hybrid is a made-up term that combines two concepts, which are not project management methods, yet we promote the integration of these concepts as a method.

If you have time, we invite you to read the blog article referenced in the footnote[18].

A related issue here is context, yes, context again. Here are a few examples:

- We use the terms method and methodology interchangeably, which is inaccurate.

- We use approaches or techniques on projects, and we call them project management methods—for example, critical path method, earned value method, and others. Therefore, the question is: what is a project management method?

Many practitioners think that a project management method is what we just shared, i.e., techniques we use on projects, which is fine. However, we prefer not to call these PMM—Project Management Methods since they are limited in scope to specific actions within a project.

The question is:

What is a project management method?

Then, what is a project management method?

We will share our professional opinion in the next section.

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[18] https://blog.urukpm.com/?s=waterfall

The journey to product delivery

Revisiting respecting our diversity

Earlier, we stated that project management has a great deal in common across domains but also differences. Therefore, it is crucial to understand the context since it directly impacts how to lead projects. For example,

- Task management tools might be good enough to manage small, straightforward projects or stages.

- How service providers manage projects would significantly differ from project owners' needs.

- Managing technology and software development would also differ from leading capital projects or projects in other domains.

Understanding the above would help in minimizing failure and debates.

Project management methods

Context

The context for the remaining parts of this paper is project management for project owners[19].

The context of this paper:

Project management for project owners.

Service providers work under a contract, often focusing on delivering an output based on some input (contract scope). Their scope could be limited to parts of a stage, an entire stage, or many stages supporting their client's project life cycle.

On the other hand, a project owner (the asset, product, or solution owner) would be responsible for the entire value delivery (and management of the product post-PLC closure). Project owners are interested in value creation. Therefore, the owner's project life cycle would be broader than a provider.

However, even within the project owner organization, we might see two models:

- A project management unit might be working per the **technical project management** approach we mentioned earlier, meaning responsible for delivering an output. As a reminder, their PLC would start with a project charter and ends

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[19] A project owner is any organizations that is building or launching a product, service, or solution that will be under their management.

with providing the output, the product of the project.

- We propose focusing on the entire value delivery, starting with the product[20] vision and ending with objective success, i.e., realizing the benefits and the value creation. **This perspective is the primary factor for defining a project management method.**

Components of a PM method

With the context of a project owner and the value delivery model, here are the components of a project management method[21]. Please remember that this is a method to manage the entire value delivery life cycle and not a technique/method we use while managing a project or a particular function.

The six primary components are:

- The foundation, a project life cycle,

- The PLC has phases/stages,

- We use the stage management processes to manage a stage,

- Each stage has an output, a stage deliverable,

- Each output must pass through an evaluation and decision point, a stage gate, and

- Finally, to support the management of a project across the entire project life cycle, we must manage the various project management functions and actions[22].
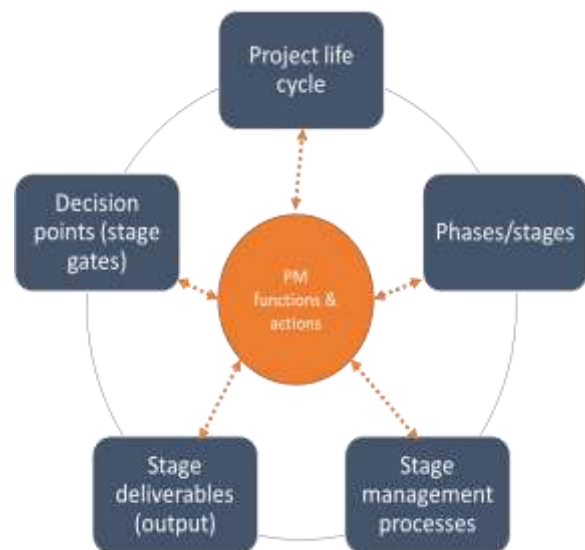
Figure 3: The components of a PM Method

The above applies to all types of projects, regardless of size or complexity. However, one-size-fits-all is not an option. Therefore, all the above core components must be

A project management methodological process must be customizable and adaptable (tailorable), which leads to the development of tailored methods!

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[20] In this context, we might interchange the terms product and asset. In some projects, this could also refer to a solution or system.

[21] A related video https://youtu.be/aArto1Mcaao

[22] Such as scope, cost, issues, risks, change, team, and communication, among other things

customizable and adaptable (tailorable), which leads to the development of tailored methods[23].

The value of a stage gate model

A core component of a project management method is the stage gates, and we know this concept intimidates many practitioners and executives. However, stage gates are vital for project success. The stage gates are critical events throughout the project life cycle within this methodological approach. Essential factors for the gates are:

- Competent project management practitioners will agree that no one should work on a project without a product vision, an understanding of the stakeholders' expectations, and well-defined requirements. Each topic could be a stage output that goes through an SG for the stakeholders' review, alignment, and decision on whether to continue. If there are no gates, what prevents the team from moving from one stage to another without adequately completing the prior stage work? What would avoid skipping a step or two if there are no control points? Finally, what ensures the team implements the proper scope of work?

- The stage gates also play an essential role in organizational and project governance. The importance of such gates is especially pertinent as more and more projects are substantial investments. Therefore, project governance becomes a keystone of corporate governance.

- Another critical factor is determining the right project investment level for each stage. In other words, is the right amount of effort in place to balance the effectiveness and efficiency of the application of project management? In each step, it is crucial to do just the required work necessary to meet the organizational requirements for the scope of the stage—no more, no less.

Why do we need a value delivery model[24]?

We used ChatGPT to explain the value of a product delivery model, and here is an excerpt from the answer.

Product delivery management involves managing the entire product development process from ideation to delivery. This includes defining product requirements, prioritizing features, overseeing the development process, and ensuring the final product meets customer needs and is delivered on time and within budget.

However, this answer is not broad enough and includes some ambiguity. Let us clarify!

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[23] This is the approach we are using to build the Uruk Platform, https://urukplatform.com
[24] In this context, we use the term model as a synonym for a methodological process.

The Uruk Model

A typical value delivery method[25]

The following image is a typical method that aligns with this approach.

Please remember, this is an example. A PLC could be four stages or ten. We could combine stages or split stages. Although the image shows most stages as sequential, they do have some overlaps. One can also see some stages in parallel. Further, the name of every stage
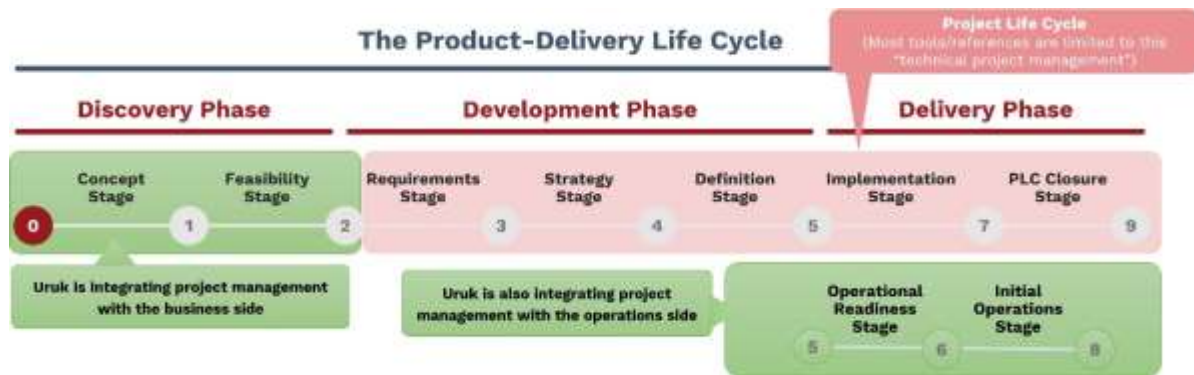

Figure 4: Comparing technical project management and product delivery management

could vary from one domain to another[26].

We can imagine some practitioners thinking this is a waterfall, but it is not. This methodology is a real-world, practical agile model[27]. Let us clarify:

- In the Discovery Phase, we define the product vision[28] and business case and perform the feasibility study.

- In the Development Phase, we progressively elaborate on the product vision. We clarify the stakeholders' expectations, define business, technical, and functional requirements, develop a project management plan, define the delivery strategy, and carry out the initial design (engineering, product roadmap, product backlog, etc.). In other words, this is the iterative product and project scope development. Is iterative not an agile concept?

- Although the image does not show it, it is during the delivery phase that we choose

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[25] The value delivery model is broader than the product delivery model.

[26] This link https://youtu.be/bV9OSlQcDhg is to a webinar on the model of the tailored method we use in the Uruk Platform.

[27] This link https://youtu.be/9hzO8O1SRSE is to a video recording of agile (or agility) in practice.

[28] Product Vision, Asset Vision, Venture Brief, and Project Brief are all relevant terms.

to use "traditional development[29]" or Agile Development[30]. Which approach to use is a function of the type of the product. *Refer to Figure 5.*
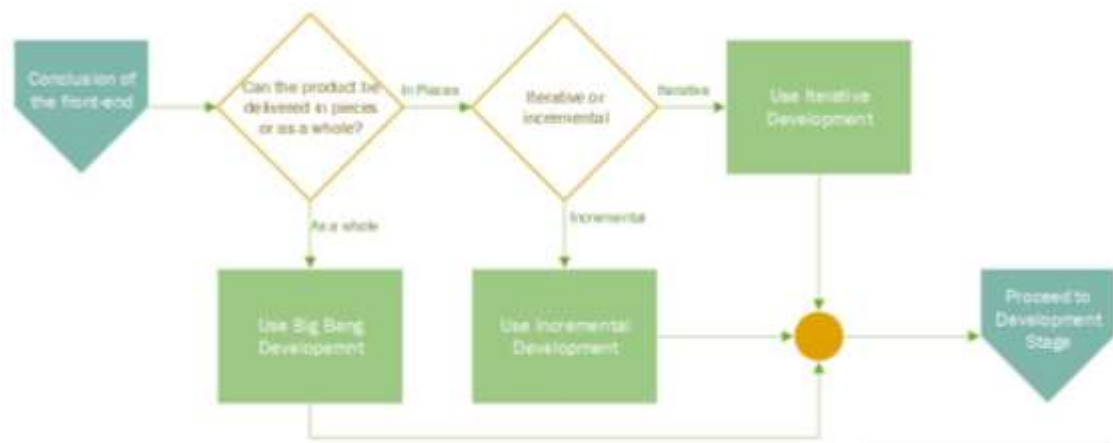

Figure 5: How to select the development approach?

The importance of the discovery phase

We will keep it short.

- There are stages in this phase, like all other stages, so we need to manage them. Do not we?

- The business unit personnel managing the discovery stages might not have project management experience. Yet, they are making decisions that would be "set in stone." Therefore, they are locking a commitment that might not be readily undone later if proven deficient.

- Various studies have shown that the success and failure of the project are often pre-determined in this phase. The feasibility study is the primary contributor to project success or failure. Even problems encountered during the delivery phase could be attributed to the discovery phase[31].

Change management (operational readiness)

First, clarification.

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[29] We do not like the term traditional, but it is the lesser of two evils (instead of using waterfall). In Uruk, we call this the Big Bang Development approach since the final product is delivered as a big bang at the end.

[30] To ensure clarity of terms and avoid confusion about agile, we are using Iterative/Incremental Development in the Uruk Platform.

[31] The Uruk Platform has two deliverables in the Discovery Phase: a Project Brief that includes strategic alignment and the business case. Also, a feasibility study report with more than ten areas to evaluate, including market analysis, financial modeling, and business and market risks.

We often use change management to either mean,

- Project change management, i.e., a change in scope or the project's plan.

- Organizational change management focused on transforming business processes or launching new products/assets.

Let us combine the second bullet with the fact that projects are mostly change initiatives, where we create something new or implement significant changes to an existing system. Therefore, let us consider a project where we are launching a new system, a digital solution. What typically happens?

Project management is often limited to technical project management. In other words, project management only exists in the IT department and is not integrated with the business. Also, PM is not integrated with operations. There is a need for integration, what we call operational readiness, since while the development team is building the product, another team needs to get ready to accept and use the product efficiently. If these things are not happening in parallel, we might end up with a completed product, but the organization is not ready to release or use it.

The same could happen on capital projects, where the engineering and construction team completes the physical entity. Still, operations are not ready to accept or operate it if they did start their change management early.

Please refer to Figure 4 for the operational readiness and initial operations stages.

Why is this important?

Integrating organizational change management and operational readiness activities into the project management process can help to ensure that projects are implemented successfully and that the organization is prepared to adopt and benefit from the project outcomes.

How to ensure this integration?

In our proposed model, we included the Discovery Phase and the operations-related stages to facilitate this process. Some points:

- Establish clear project objectives,

- Establish acceptance criteria and project success criteria,

- Identify all relevant stakeholders,

- Frame the opportunity through proper feasibility,

- Conduct a change impact assessment, which could also be part of the feasibility study

- Develop a change management plan,

- Develop an operational readiness plan,

- Integrate change management and operational readiness activities into the project plan,

- Monitor and evaluate progress,

- Assess project success in line with the defined criteria, and

- Capture lessons learned for future enhancements.

Breaking the silos

Roles and responsibilities

We have not discussed the human side of all the above; that is a significant discussion and is outside the scope of this paper. However, we must stress that project success is collaborative among various team members. What we need is the following:

- The project sponsor,

- The project manager,

- An operational readiness manager,

- The project management team,

- The rest of the project team, and

- Ongoing engagements with the relevant stakeholders.

The collaborations

Project sponsors, managers, and teams can take the following steps:

- Build relationships with stakeholders, especially in the areas that are traditionally outside project management scope,

- Facilitate requirements gathering workshops,

- Conduct research and analysis,

- Collaborate with cross-functional teams,

- Communicate clearly, and often, with an understanding of the audience diversity,

- Have an excellent knowledge of the organization's strategic direction,

- Also, know the industry and trends affecting the industry,

- Determine if the project aligns with the strategy; if not, have the courage to stop the project.

Closing comments

The following are vital points to remember as we close this paper.

- Organizations must have project management systems and methods,

- Ideally, the OPMS should be based on the three pillars of people (competence), processes (methods), and tools (technology),

- The methodological model must include the components of a project management method that we outlined in the paper,

- An adaptive methodology is customizable and adaptable, producing unique tailored methods,

- If your project can be successful with task management, stage management, or technical project management, that is OK,

- However, we advise using a product delivery approach for project owners since such an approach will increase the chance of success.

- An effective change management process will minimize the resistance to change and break the organizational silos.

- Project managers are not kings and queens; they must operate within the system, with other team members, and in collaboration with the relevant stakeholders.

We wish you success today, tomorrow, and always!