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Project Management Methodology (PMM): How can PMM serve organisations today?

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Abstract

Survival is one of the most crucial driving forces for many companies today. Once executives recognize that project management is needed to make it happen, changes occur quickly. However, failing to use a project management methodology (PMM) may jeopardize an organisation’s efforts and overall effectiveness, in respect to knowledge management, repeatability, comparability, quality and future impact. In the context of efficient project management, this paper conducts a literature review to discuss the psychological and physical roadblocks that prevent organisations from implementing a PMM, and revisits a deployment model to mitigate the issues. Research implications include a behaviour management strategy grid that may also serve to change leaders and policy makers. For practitioners, this paper suggests a single integrated tool, in lieu of many, through a 10-step action plan designed to make its deployment, as well as the organisation itself, successful.

Characteristics of today’s organisations

In today’s economy, the nature of work has changed (Heerwagen, 2010):

- It is more specialized in terms of context
- It is more dependent on technology
- It comes with shorter deadlines
- It is becoming more mobile and less dependent on locations
- It requires more collaborative resources and social skills, both in leadership and teams

Correspondingly, organisations today should:

- Be focused, particularly on customer value
- Adapt to changes, by:
  - being more in tune with dynamic requirements and strategy
  - continually improving competitive advantage
- Be agile and hands-on, and less hierarchical in terms of decision making

It is notable that change management is at the centre of the necessary transformation, and it also appears to be indispensable. From this perspective, it does not look like change is an optional process; in other words, organisations must adapt in order to survive. Nevertheless, the survival dimension forms the organisations’ strategy as the first priority, rather than other managerial aspects, and programmes and projects should follow this in order to support such a direction. In the end, the above points describing how organisations of today should act also relate to the desirable qualities of a well-equipped project manager, especially in terms of a definition of requirements, competence in technology, good communication skills, commitment to continuous improvement, and being able to work without boundaries. Historically, project managers have always struggled within the organisational hierarchy in one way or another, and have explored different types of power (e.g. legitimate, referent) in order to get things done. Unlike the past, the new era fortunately appears to be acknowledging project managers more than ever before. From this point of view, project managers may be living in a decade that they can perform their profession to a biggest audience ever, an audience which is quite eager for project management’s benefits with no doubt, such that “managing companies like managing projects” can become a remarkable coupling that may enlighten future studies.

In theory, most companies have only one driving force. Although in practice a number of factors are often mentioned, in reality, after combining all of these, survival is the one and only driving force (Kerzner, 2005). In light of the points mentioned earlier, this can form a foundation for the cycle in Exhibit 1.
Exhibit 1 Managing organisations like managing projects

What makes project management methodology important?

Once executives recognize that project management is necessary, changes quickly occur. In other words, managing successful projects will lead to success for organisations, and project management is therefore vital. However, knowing the project management basics and having employees with a structured education in project management does not necessarily guarantee that project management is being used in an organisation. Furthermore, even if it is being used, it may not be used effectively (Kerzner, 2004).

Choosing a unified, singular project management methodology (PMM) is an effective approach by which to consolidate prior project management efforts in an organisation. From this perspective, PMM not only plays an important role in securing the presence of a common language and common processes, which are fundamentals of project management, but also helps to provide benchmarking studies which may produce continuous feedback for the organisation. The literature suggests numerous benefits of using a PMM within an organisation; the benefits that are commonly agreed upon can be mapped as shown in Exhibit 2.

Exhibit 2 Benefits of using a project management methodology

<table>
<thead>
<tr>
<th>Knowledge management/ Project documents</th>
<th>Repeatability/ Consistency/ Sustainability</th>
<th>Benchmarking/ Comparability of success metrics</th>
<th>On-going improvements/ Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarke, A. (1999)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chiocchio, F. (2007)</td>
<td>●</td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Müller, R., &amp; Turner, R. (2007)</td>
<td></td>
<td></td>
<td>●</td>
</tr>
</tbody>
</table>

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According to Wysocki (2011), every good PMM should be able to trace the estimated and actual task durations, where this may fall into the capabilities of project management software (PMS), rather than the PMM tool itself. Although there is no compelling dichotomy against this duality, practitioners currently deal with two different systems, which are flexible to the extent allowed by data integrity.

PMM entails more than forming process groups; its starting point is usually considered to be the definition of project characteristics in the organisation, and the establishment of a common understanding of an organisation’s success metrics (Kerzner, 2005; Wysocki, 2011). Accepting the necessities as inputs and the benefits as outputs, a PMM can be framed like a funnel, where, due to the current practices that are used in reality, PMS would be an external, but valid and vital part of the PMM (Exhibit 3).

Exhibit 3 Inputs and outputs of a project management methodology
Common roadblocks that prevent organisations from implementing a PMM

Psychological reasons for resistance to change

According to the extensive literature review conducted by Dent and Goldberg (1999), the number one reason for resistance to change within an organisation is a threat to job security/status. Dent and Goldberg (1999) also outline other reasons, such as a lack of trust, misunderstandings, emotional side effects, work group breakups, personality conflicts, uncertainty and fear of failure. Traditionally, social psychological research divides this conception effort into a tripartite view: cognitive, emotional and intentional (Ajzen, 1986). Cognitive research is interested in the inner reasoning of actions, where emotional and intentional dimensions can be seen as typical outputs and both of them can be significantly polarized, either negatively or positively. Although this tripartite view is considered to be quite compartmentalized, there have been several attempts to seek interactions among them (Piderit, 2000).

In reference to changes needed for the deployment of a PMM in an organisation, Kerzner (2005) frames the roadblocks in a similar manner, and groups the outputs into four categories: resistance to having a structured methodology within the organisation; comfort zone (i.e. a “What we already have works well” philosophy); believing that methodologies need rigid policies and procedures; and resistance to “horizontal” accounting. It is notable that cognitive groundings are again formed by either fear (including lack of trust), or, conversely, “boiling frog syndrome”. In one sense, the former is hypothetically easier to address, since in order to develop fear, employees must have certain knowledge about what it is going on. However, the latter may refer to a group that is not aware of the changes required, or, even worse, they might still think that everything is perfect.

Physical reasons for resistance to change

In the context of PMM, another dimension should be the practical aspect, which deals with feature set of the tool that organisation uses (Exhibit 4). From the end-user’s point of view, typical physical roadblocks consist of product limitations in terms of openness to customisation, data integration and functional convergence. These can be summarized as follows:

- Customisation: Although customisation seems to be part of many tools, it is not necessarily easy to apply, or even if it is straightforward, it can be significantly limited by the general logic frame of the tool.
- Data integration: Data integration is often needed to address how to use multi-platforms for different necessities of the organisation. For instance, very often, a project has to be managed through PMS, while its methodology has to be managed through a different tool and at a higher level. Although they theoretically complete each other, it is unfortunate to note that, from the data integration perspective, they look like they are in competition.
- Functional convergence: Convergence is everywhere, and is one of the most desirable attributes of technology. For instance, for many years, the term “Information and Communication Technologies” (ICT) has been used to symbolize its immersive effect. Today, voice and data, as the basic ingredients of ICT, are inseparable, even in the way that we perceive them. This begs the question as to why project management methodology and software cannot be utilized within the same tool.

Exhibit 4 Reasons for resistance for change

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What makes PMM successful?

Deployment success depends on how roadblocks are addressed. According to Kerzner (2005), there are five phases of successful deployment within a PMM (Exhibit 5):

Exhibit 5: Deployment phases of a project management methodology (Adapted from Kerzner, 2005)

Awareness

At this stage, any overconfidence should be questioned. It is necessary to ensure that everything really is going well, rather than just looking good. Fear, as the more common root cause comparing to overconfidence (Exhibit 4), may usually be accepted as a reflection of personality of an individual, even an – considering entity as an individual – organisation, particularly for the one who is used to fear of a variety of subjects, as well as fear itself. From this perspective, fear should be framed in a general sense, not only in terms of resistance to change, but with reference to wider aspects as well. Therefore, one should not blame the “need for change” for triggering the fear, which may always have been there. What is important is to remember that change is recommended to mitigate existing problems that threaten stakeholders, including the company, employees, customers, and even suppliers. In other words, the aim is to overcome, or, better yet, avoid the creation of problems, and deal with problems that already exist. From this point of view, the first step is to recognize any problems that may arise, then we may be the one who want that changes occur.

Sponsorship

A comfort zone, by definition, is part of a static environment. However, in contrast to this, those who seek to remain within their comfort zone should know that it only exists in dynamic environments in today’s world. Therefore, change and adaptation seem to be unavoidable. Once an organisation is aware of this, executives must sponsor the initiation of change and adaptation within the organisation. Without endorsement from leadership, it is impossible for change to lead to success.

The possible outputs with respect to changes within organisations can be either emotional or intentional. It is notable that these may have negative and positive polars; the former diminishes value and deteriorates efforts, while the latter contributes to improvements and works towards a larger buy-in from stakeholders (Exhibit 6).

Exhibit 6: Behaviour management strategy in changing environments
Leaders should acknowledge both the emotional and intentional aspects within their different strategies, for the sake of maximising benefits. Leadership may consist of:

- Efforts to communicate any problems that the organisation must overcome: everyone is in the same boat, so the ball is everyone’s court
- Mitigating fear by building trust: keep doors open
- Leveraging ambassadors: utilizing existing champions
- Monitoring gate keepers

Readiness

A similar technique as that outlined above can be used by line management, in terms of both recognizing problems, and overcoming them. However, it is notable that line managers may need to manage more problems that executives need to manage. For instance, at this stage, experts may raise issues regarding the physical aspects of the change. Change management is correlated with strategy, programme management and projects. Although using a PMM contributes to vital aspects of change management, such as managing procedural documents, repeatability, benchmarking and continuous improvement, inflexible systems (i.e. PMM and PMS) may create incremental boundaries. A description of the current tools used within PMM and PMS was provided in earlier sections, and several issues were scrutinized, including limitations with respect to customisation, data transfer and functional convergence. Ultimately, end users will want to ensure that the tools (or, preferably, one complete tool) that they are expected to use will help them, rather than jeopardise their goals. Typical objectives here would include:

- Making sure that the “ball is everyone’s court” motto is clearly embraced within the organisation
- Utilizing two-way communication effectively in order to maintain trust within the organisation
- Finding out whether new champions exist within the followers and hesitaters, and creating a candidate pool
- Identifying physical issues

Acceleration

During this stage, the project management life cycles are identified. Depending on their skill set, champions might also want to contribute. The development should lead to decisions about the tools that will be used. This should be accompanied by any necessary training. Gate keepers should not be part of any crucial step; however, it is important to distinguish gate keepers from “always tells the truth” types. Although, it would be its own truth, in other words, it will not be real-reality in an epistemological sense; this may not make it wrong or harmful. From this point of view, the first response (emotional), even the second (intentional) may not reflect the real intention or inspiration. Therefore, further stages, like acceleration, can serve as opportunities to reassess and fine-tune the zones (Exhibit 6) and benefits. The typical actions can be summarised as follows:

- Creation of project management life cycles within the organisation
- Selection of tools (or one complete tool), for PMM and PMS, which best address(es) the physical issues
- Designing the necessary user training for the tool(s)

Maturity

Completing prior steps can prepare the organisation for the integration of knowledge areas, particularly in relation to cost and schedule. The integration of charge numbers and cost account codes with scheduled tasks may require more extensive integration, perhaps with a tool that is already used within the company. It should be borne in mind that having different tools within the organisation for different purposes does not guarantee that attempts will be made to integrate them. Resistance to change can be reborn at this stage, since many of the stakeholders will not want to be closely controlled, especially when it comes to budget. Although techniques for dealing with resistance may remain the same, the effect of sponsors may not be as clear as in the earlier stages; therefore, sponsorship phase may have to be revisited. According to Kerzner, a company’s journey with respect to developing a PMM is a lifelong commitment (Kerzner, 2005). Therefore, it should always be supported by ongoing education curriculums. It is notable that this fifth phase is also known as the end of the second out of five levels of Kerzner’s maturity model, as well as the initial phase of maturity of an organisation. The action points can be summarised as follows:

- Developing a cost/schedule control system
- Physically integrating the cost/schedule control systems
- Developing on-going educational curriculum

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Excellence

Maturity can be judged by its fruits excelling project management in an organisation, particularly in favour of customers. Customer centricity, being a natural component of selling factors, consists of recognition by customers, high customer satisfaction (Kerzner, 2010). Therefore, organisations, especially which already use PMM, may want to revisit their methodology(ies) in the light of customer centricity. The methodology should be flexible enough to be tailored to customer needs. For instance, it is not uncommon that key performance metrics are prepared by both parties; company and its customer; therefore, dashboards should be customizable to reflect the customer needs at best. In larger sense, project management excellence can be perceived as an art of integration; integration of systems (PMM and PMS) and stakeholders (organisation and customers).

Conclusion

Successful project management secures a company’s survival, and PMM is indispensable to ensure projects’ success, in terms of:

- Knowledge management: If the system does not allow project management documents to be archived in an interactive digital environment, knowledge management will fail.
- Repeatability: If a company fails to maintain repeatability within the organisation’s processes, it will also fail in terms of consistency and sustainability.
- Comparability: If a company is not able to identify, or compare with, internal actuals, as well as industry averages, it will fail in benchmarking, which may deteriorate continuous improvement efforts.
- Ongoing improvements: If a company fails to address the needs for ongoing improvements, the positive impact of project management, as well as an organisation’s presence, may be jeopardized in future.
- Quality: If a company fails to choose the right system(s) to support functional convergence as a key determinant, practical problems with data integration – between PMM and PMS – may cannibalize the project’s success.

In light of the idea that treating “managing companies like managing projects” might be a useful philosophy for today’s organisation, a 10-step action map is suggested, which provides a sequence and work load order. Exhibit 7 frames the actions as shown below:

Exhibit 7 10-step action map for successful deployment of a project management methodology

<table>
<thead>
<tr>
<th>Action Steps</th>
<th>Awareness</th>
<th>Sponsorship</th>
<th>Readiness</th>
<th>Acceleration</th>
<th>Maturity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Clearly communicate the problem and what to change</td>
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<tr>
<td>2 Exploit the two-way communication channels</td>
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<td></td>
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<tr>
<td>3 Utilize champions</td>
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<td></td>
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<td></td>
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<tr>
<td>4 Monitor gate keepers</td>
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<td></td>
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<tr>
<td>5 Upgrade followers and hesitaters</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Identify physical issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Create project management life cycles for the organisation</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>8 Select tool or tools</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>9 Develop/Integrate a cost/schedule control system</td>
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<tr>
<td>10 Develop an ongoing educational curriculum</td>
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</tbody>
</table>

The success of a Centre of Excellence (CoE) in project management can be assessed to the extent allowed by integration of systems (PMM and PMS) and stakeholders (organisation and customers).

Grouping with knowledge areas

In terms of knowledge areas, these steps can be grouped into four:

- Steps 1 and 2: Communication Management
- Steps 3, 4 and 5: HR Management, Stakeholder Management
- Steps 6, 7 and 8: Quality Management
- Steps 9 and 10: Integration Management
The second group, particularly managing behavior, as shown in the grid in Exhibit 6, can be, conceptually, considered as a part of both human resources management (PMI, 2008) and stakeholder management (PMI, 2013). In the third group, decision makers should remember that, by its nature, data transfer may always create issues, even with trivial transactions. For instance, transferred tasks may not always come with full information, including task durations and resources; problems with the latter, in particular, are not uncommon. From this perspective, it can be considered as a part of quality management (in particular of step number 8, procurement management may also apply) and using a unified system may be more effective (Exhibit 8).

![Exhibit 8 An integrated view of a project management methodology and software](image)

However, the word “unified” does not necessarily refer to a “single” methodology. Consolidating the existing methodologies and choosing only one would also be sufficient for quality management purposes. The latter forms contextualized boundaries, while the former forms the execution platform. In the end, although it is a natural part of the second level of the Kerzner Project Management Maturity Model (KPM3), a singular methodology is more often considered as a part of the third level of KPM3; though this was not the primary scope of this article, it definitely deserves attention (Kerzner, 2005).

**Grouping with work load characteristics**

Finally, as an alternate way, a 10-step action plan could also be examined through its work load characteristics. Although sequence look gives an order for tasks, it does not reveal the duration of steps and its distribution among phases. For instance, although step 6 follows step 5, the suggested pressure point of its application is higher in the third phase – unlike step 5 – than it is in the fourth phase. In the end, in most cases, steps should work simultaneously. The types of workloads in which the mode is front loaded can be summarized as:

- Step 1: Turtle
- Step 2: Front loaded
- Steps 3, 4, 7, 8, 9 and 10: Back loaded
- Step 5 and Step 6: Bell

In terms of phases, having a front loaded mode, the work load distribution can be estimated as 10%, 15%, 25%, 25% and 25%. In other words, as long as phases move forward, the work load will gradually increase, which is usually considered as more preferable.
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