

## Reconstructing Project Management – Part 2

By Peter W. G. Morris

(A book review by R. Max Wideman, FPMI)

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In the first part of this paper last month, we introduced Peter Morris and his book; an outline of the book's structure; What we liked in its Part 1: Constructing Project Management; and What we liked in its Part 2: Deconstructing Project Management.

Also in Part 2 of his book, Peter goes on to deal in some detail with a number of topics. These include: Control; Scope Management, Configuration management, Scheduling; Cost management; Organization, including the importance of the Sponsor; Governance and Strategy; Procurement; Risk and Benefits management; People, leadership and Teams. Along the way, he provides many useful bulleted lists of items for the practicing reader to adopt or avoid as the case may be.

However, one thing in particular caught our eye:<sup>1</sup>

"... project managers – project leaders etc. – will often have to adapt their style to fit a whole raft of factors – not just the nature of the project but the form of contract, the characteristics of the people being managed, and above all, the nature of the tasks being undertaken. This will mean for example that *the style of management and leadership required for the front-end will almost certainly be substantially different from that required for downstream execution.*

Yet in practice the discipline is too often judged as relevant or not by the appropriateness of the style of project management being displayed (and project management usually behaves as execution management à la Kotter). This is the tail wagging the dog. In fact *the discipline requires that the style of management should adapt to the needs of the project task being managed.* Few project managers, in my experience, even acknowledge this, let alone do it. And in truth, for many it is a very difficult thing to do." (Emphasis is the author's.)

We think the last two sentences are open to question, but otherwise we heartily agree with both sentiments. Interestingly, we wrote several papers relating to this subject back in 2002, see for example: "Dominant Personality Traits Suited to Running Projects Successfully" This fourth of six papers focuses on four dominant personality styles in project leadership, and how these relate to project work and the project life span.<sup>2</sup>

### What we liked – Part 3: Reconstructing Project Management

Peter Morris starts out this part of his book by posing the question:<sup>3</sup>

"Is project management a discipline or a domain? If it's a domain, we can sit back and ruminate at our leisure. If it's a discipline, things get tougher: there has to be logic – a discipline – to the way its knowledge and its actions are deployed. And people need to be trained in it and practice it. This is the subject of Part 3: how should the elements of project and program management be re-assembled – reconstructed — so that the discipline adds value, given today's and tomorrow's social and business needs?"

Well, the description seems to answer the original question. Project management is a discipline. No doubt there are some academics that prefer to see it as a "domain" so that they can indeed "sit back and ruminate at [their] leisure". This at a time when what is really needed are foundational studies and testable theories to underpin what is actually done in the course of successful basic project management (note, not including technology management!)

Peter then embarks on quite a long scholastic discussion of the character of our PM Knowledge, in which he gets into "ontology", "epistemology" and "methodology" and even "teleology".<sup>4</sup> Along the way, Peter discovers that if the label "project management" does not cover the whole territory then another term is needed. Such a term as "The Management of Projects" could cover both programs and projects – and project portfolio management for that matter.

"Its unit of analysis is the project. The project is defined, pre-eminently, by its development life-cycle. The Management of Projects is as concerned with managing the front-end as with the down-stream execution."<sup>5</sup>

Obviously, that reference to "development life-cycle" should have read: "project development *sequence*". Setting that aside, however, Peter chooses to refer to the whole area as "mop/p<sup>3</sup>m" which stands for: "management of projects/project, program and portfolio management" – a not inconsiderable mouthful. We think that simply establishing an "official" change in the definition of "project management" would have a greater probability of success. Indeed, it is already frequently used in that sense.

Peter also suggests that rather than:<sup>6</sup>

"... projects being defined first and foremost as temporary undertakings ... We have surely to begin with addressing the 'why' and teasing out what are good practices relative to accomplishing projects and programs successfully."

Well, yes, of course, but that is the purpose of a well framed but succinct Project Business Case – to answer the question: Why this project? Project management is a delivery system and if you don't have a satisfactory answer to that question, or indeed have no answer at all, there appears to be little purpose in doing the project in the first place.

In our view, the satisfactory answer to the question: "Why" should be the culmination of Peter's "Front-end phase work". And, yes, since money is necessarily spent on such preparatory work, it is definitely a part of the project investment – and should be recognized by all concerned as such. This would be entirely consistent with our proposed revised definition of Project Management, and provide a more substantive basis for achieving and assessing the success of the project and its resulting product. Unfortunately, current literature and practice, to say nothing of standard accounting practices, do not appear to support this position.

In Summary, Peter observes that:<sup>7</sup>

"We are well past the critique that says that project management professionals need to move beyond the mechanical application of practices and techniques. There *is* method behind the application of mop/p<sup>3</sup>m, but there needs additionally to be understanding in some depth of the different disciplines and knowledge domains that are called on in creating and delivering projects and programs effectively. The ensemble needs to be applied in an ordered way: moving from the business case and strategy; through technical and commercial development; building an organization; exercising control; making decisions; and managing people. ... The task of the project manager is to integrate the

work of these different specialists to achieve the sponsor's goals."

All of that is perfectly true and we applaud the logic behind the sequence described. But we see two shortcomings: *First*, there is work involved in the project **before** the project's business case, in order to arrive at that business case, and that incurs costs that are, or should be, a part of the project. That is to say, Peter's "front-end" starts even earlier than just at the business case presentation and approval and, more importantly, that prior work can also have a serious impact on the successful outcome of the project. For example, what if the concept described in the business case is fundamentally flawed, but proceeds because it is politically popular? *Second*, there is no mention of the army of technology specialists frequently required for the project and who also have to be managed as a part of that project?

## Downside

Earlier we noted Peter Morris's remarks that in contrast to PMI's PMBoK:<sup>8</sup>

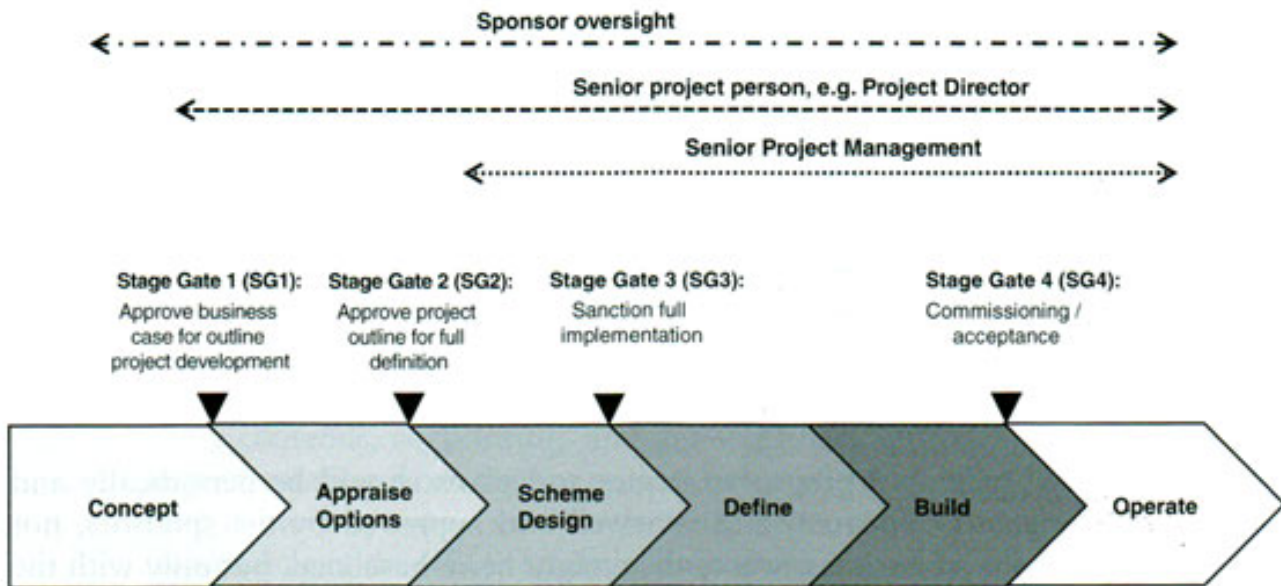
"The APM based its Body of Knowledge not on the knowledge that is 'unique to project management' but on what you need to know in order to manage projects successfully. In practical terms, it considered the PMBOK® Guide misguided in its omission of the front end and too narrow in its definition of the subject. APM thus produced a broader document which followed the 'management of projects' model, recognizing topics such as objectives, strategy, technology, environment, people, business and commercial issues, and so on."

And concluded that:

"The model of project management represented by the PMBOK® Guide is one essentially of delivery execution: one where the requirements have at most to be 'collected'; where the cost, schedule, scope and other targets have already been set. The ethos of the discipline is then to 'monitor and control', not to actively shape and drive solutions."

There are several observations that we can make about Peter's position:

1. PMI's focus is on the knowledge required of the **project manager** and the corresponding body of knowledge thus required. True, this is narrow, but then the reality of the market place is that project managers, whether in-house or external are contracted to deliver whatever has been decreed. Thus, the responsibility of the project manager is to be satisfied that what has been decreed, together with any constraining terms, is in fact realistic and doable. ***It is not the responsibility of the project manager to invent the project in the first place – unless specifically directed – which would be unusual.*** There are others much more qualified.
2. Nevertheless, project management as thus contained is much more than just the start of "digging the hole for the foundations". There are typically one or more phases, albeit late in Peter's so-called "front end", which are indeed the responsibility of the project manager. For example, setting up for the project execution (initiating), and preparing a (detailed) plan (of the work to be done, together with mobilizing the team, procurement arrangements, pre-ordering, logistics, administration and so on.)
3. Unfortunately, we did not find a satisfactory definition of Peter's "front-end", but if we had we would expect it to cover all of that period of time in the (overall) life span of a project that occurs upstream of the afore mentioned activities.<sup>9</sup> That is not to say that "front-end" work is not important, it is – desperately so – as Peter goes to great lengths to emphasize. It is just not the work suited to the skills of a project manager. Business analysts, for example, are better qualified to fill this gap further upstream, see Figure 1.



**Figure 1: Roles in the management of projects<sup>10</sup>**

4. So while PMI's position may be viewed as strictly limited, in contrast, APM's recognition of such topics as " objectives, strategy, technology, environment, people, business and commercial issues, and so on" smacks of everything to everyone. In our view, this is equally an untenable position in practice. Can you really satisfactorily certify an individual on such a compass?
5. Further, while the shortcomings of the PMBOK® Guide are clearly evident, nevertheless, PMI was the first to attempt the institutionalization of the domain of project management. And in so doing, they faced at the time, considerable pressure to avoid trespassing on any of the knowledge domains claimed, and hotly defended, by "other professions". By adopting the stance of "unique to project management", they had the perfect defense.
6. There is another fundamental that we feel is missing from Peter's extensive repertoire. That is a clear distinction between "project management as the work of managing the project according to the given terms of governance imposed by the-next-level-up in the corporate hierarchy" and "technology management, the work of actually creating the envisioned product." In the real world, this distinction is frequently evident by the assignment of "project/product" responsibility to two people acting in concert. That is, a project manager, expert in managing projects and a technical manager, who is a subject matter expert (SME) in the technology vested in the product to be delivered.<sup>11</sup>
7. While the two, "the work of managing the project" and "the work of creating the product", are practically inseparable, nevertheless, their separate distinction and study would eliminate a lot of the conflict in the discussions on both topics.

Look at it this way. The study of the heart in humans is quite separate from the study of the brain. Yet, in real life, neither will perform without the other, and the interaction between the two is not always exactly clear.

## Summary

This is an academic tome, yet at the same time we did find it surprisingly easy and enjoyable reading. That's largely because it is written in a clear, unambiguous style. There is no question where author Peter Morris is coming from. We also hope that as a "non-academic" we are not being presumptive in declaring that the contents throughout the book provide incredible insights and sound and realistic advice. Having said that, we should add that given Peter's experience and background his book does lean heavily towards projects of the more tangible output type such as infrastructure, rather than the less tangible such as information technology.

But where are we heading with all of this? The book sets out to Construct (in Part 1), Deconstruct (in Part 2) and Reconstruct (in Part 3), so in a preemptive observation at the end of Part 2, titled "Foundations for the future", Peter observes:<sup>12</sup>

"What I argue for is ... that the unit of analysis should be the project, rather than project management processes or functions, but that, in addition to studying projects as organizational phenomena, we should be looking at how their conception, developing, execution and handover can, and should, be managed."

Interestingly, this observation speaks to the issue of the design of the project's life span and reflects design for management and control purposes. That is to say, it invokes the concept of "governance" handed down by the next level up in the organizational hierarchy. This is clearly beyond the scope of the existing definition of project manager.

Peter goes on to observe:<sup>13</sup>

"And that we should be thinking of the purpose for which [the projects] should be being managed. They should add value to the realization of the sponsor's aims and strategies, should 'fit' the context in which they and their sponsor will be operating, and should be alert to, and address, the changes in business and societal conditions that we see coming down the pike."

This pushes the responsibility even higher in the organizational hierarchy, and begs the questions: "What knowledge is needed to manage [such] projects successfully?"<sup>14</sup> And "Is 'Project Management' the generic term for this [whole] knowledge domain?"<sup>15</sup> For example, Peter observes that:<sup>16</sup>

"Portfolio Management is, as we've seen, about managing the allocation of resources in terms of the opportunities available, the risks posed, and the potential returns offered."

"But it is actually more than this. It's said of Steve Jobs that one of his decisive skills as [the late] CEO of Apple was his judgment on which of the many, many options to develop next [but] Apple should *not* do. His judgment in managing the overall Apple portfolio, in selecting the features to incorporate, was critical to the success of the company."

From this we are left with the impression that the responsibility for project management, in its fullest sense, clearly stretches right up to the person in the "top job". We are inclined to agree, but with responsibility for ultimate success delegated across a variety of people, each responsible for a diversity of parts, the coordination of which in the production phases is the responsibility of the project manager.

Peter ends his book with "Conclusions for the Discipline", a list containing no less than 44 observations and recommendations.<sup>17</sup> Plus one parting shot.<sup>18</sup>

"Be positive and determined. But enjoy the humor of life. 'That day is wasted on which we have not laughed.'"

Amen to that — a fitting end to an exhaustive book that should be on the bookshelf of every serious practitioner of project management.

What is our personal takeaway?

- "Project management", in its broadest sense, is the totality of the subject described in this book.
- Therefore, project management in this broader sense is a big and serious team discipline. However, in practice it is doubtful that "The Project Manager's role" can be so all encompassing. This role is best focused on the challenging business of planning and execution of realizing the intended product.
- Others are better equipped to recognize and deal with Peter's essential "Front-End".

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<sup>1</sup> Ibid, pp200-201

<sup>2</sup> See <http://www.maxwideman.com/papers/personality/intro.htm>

<sup>3</sup> Ibid, p232

<sup>4</sup> If you don't know what these mean, don't worry — you can always look them up on the Internet.

<sup>5</sup> Ibid, p235

<sup>6</sup> Ibid, p116

<sup>7</sup> Ibid, 247

<sup>8</sup> Ibid, p61

<sup>9</sup> Peter does provide three possible definitions of "Front-End", p164, but these do not cover the very original formulation of the project's "Concept" (his Figure 11.1). These costs, if captured, are also capitalized when the project goes into service. But if the project is aborted, these costs form part of corporate overheads.

<sup>10</sup> Peter Morris's Figure 11.1

<sup>11</sup> Peter does raise the question of how involved project management needs to be in managing the technical development of a project, p167, but tends to avoid a definitive answer by referring to the "right processes and practices" being in place and followed, p173.

<sup>12</sup> Ibid, p233

<sup>13</sup> Ibid

<sup>14</sup> Ibid, p234

<sup>15</sup> Ibid, p235

<sup>16</sup> Ibid, p273

<sup>17</sup> Ibid, pp283-286

<sup>18</sup> Ibid, p286 – quoted from an imprint on the sundial at Mansfield, an old English country house!