

An Examination of the Roles & Responsibilities of Modern-Day Project & Program Managers

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Do you remember...

...the *exhilaration*?

Do you feel...

...the *exhilaration*?

Or...

Do you feel...

...exasperation?

What I learned...

*In Project & Program Management
there are many “Exasperados”*

Exasperados:

Experienced, successful, and yet somehow exasperated project management professionals who are frustrated by a lack of clarity about their organizational roles and responsibilities (and for some, their career paths)...

Why do PMs become exasperated?

It's not just about...

Their need for PM subject matter skills

Their need for “soft skills”

Their need for leadership skills

...though these are all critical

Why do PMs become exasperated?

Often it's about...

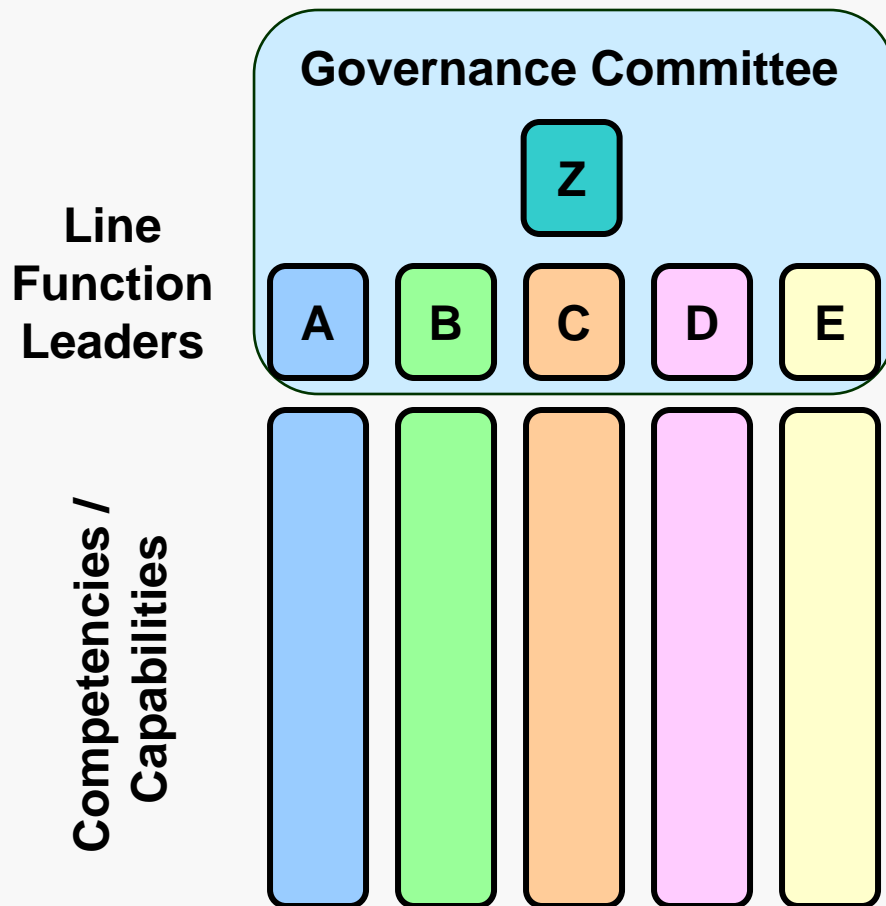
- **Their organizational environments:**

Governing processes, bureaucracy, culture, politics

- **Their need to manage change within that environment**
- **Their desire to demonstrate more leadership**
- **Confusion over their roles and responsibilities**

What are a PM's Roles and Responsibilities???

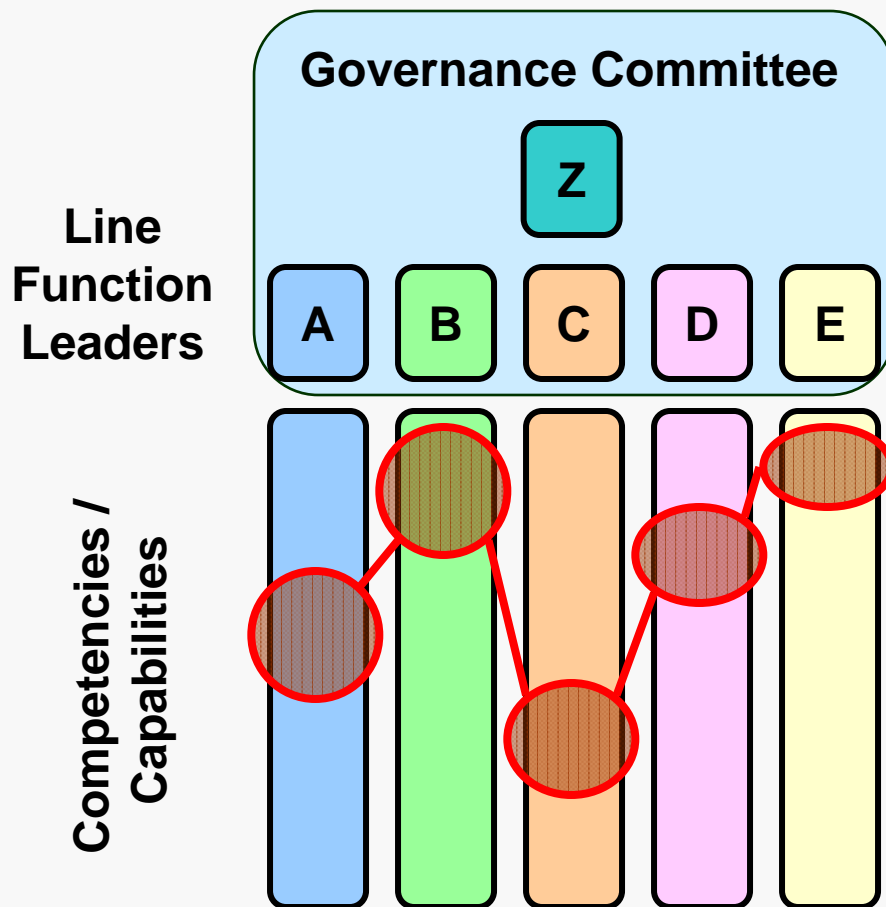
The Role of PM in Hierarchical Organizations



Common Organizational Structure:

- Senior management governance committee defines high-level strategic objectives; supports and synchronizes activities
- Line function leaders manage operations within each competency domain

The Role of PM in Hierarchical Organizations



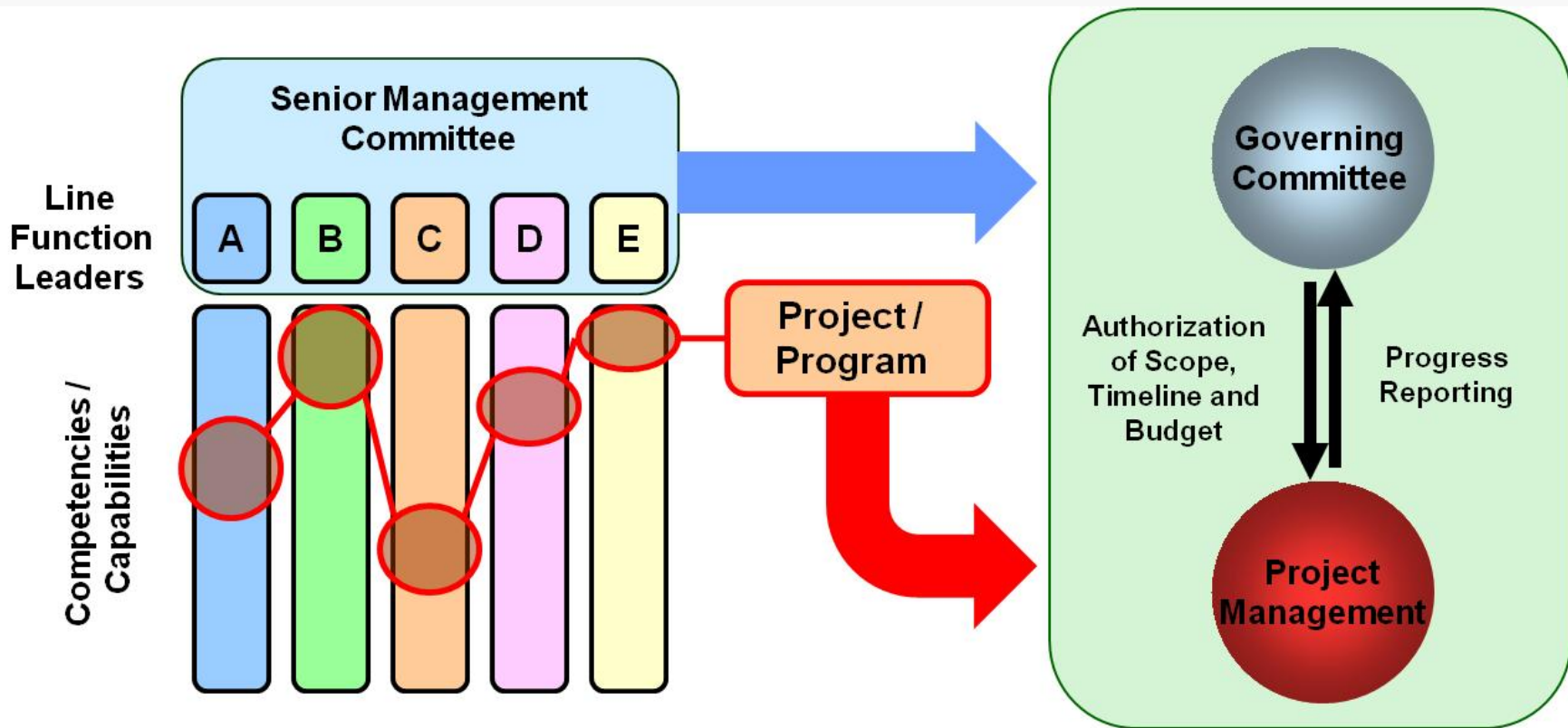
Project/Program Initiation:

- The governance committee authorizes cross-functional initiatives to accomplish specific (new) things

Program/Project

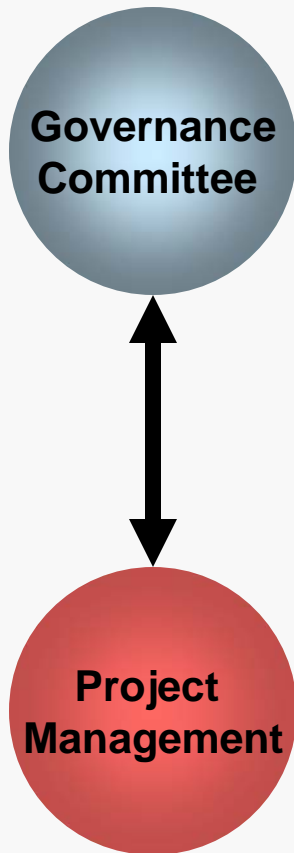
- Line functions commit required resources
- PM manages the initiative
- The governance committee monitors progress and authorizes any changes

The Common Conception of Project Oversight



A “simple” model common to industrial-age organizations.

Presumed Roles and Responsibilities



Governance:

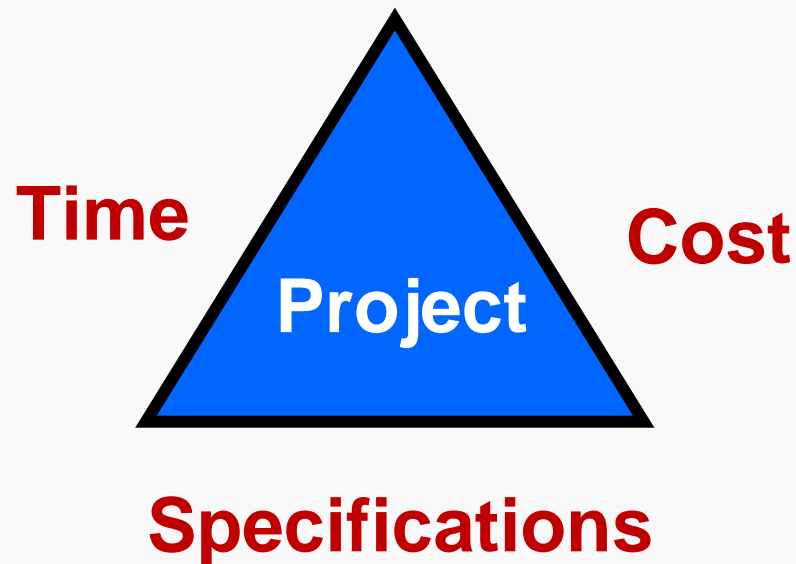
- Defines strategic direction
- Authorizes and prioritizes projects
- Establishes “enabling” conditions
- Endorses project strategies
- Manages resource allocations
- Delegates responsibility & accountability
- Integrates learning from outcomes
- Authorizes change

Project management:

- Oversees the efficient completion of work
- Ensures collaboration, communication

Project Management's "Credo"

To deliver on time, on budget, to specifications

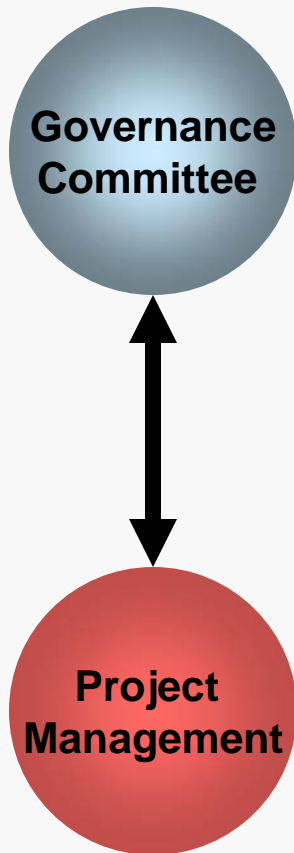


Make predictions and then prove you were right!
(A contractual relationship)

Roles and Responsibilities

Is it that simple?

Weakness of the “Simple” Governance/PM Model



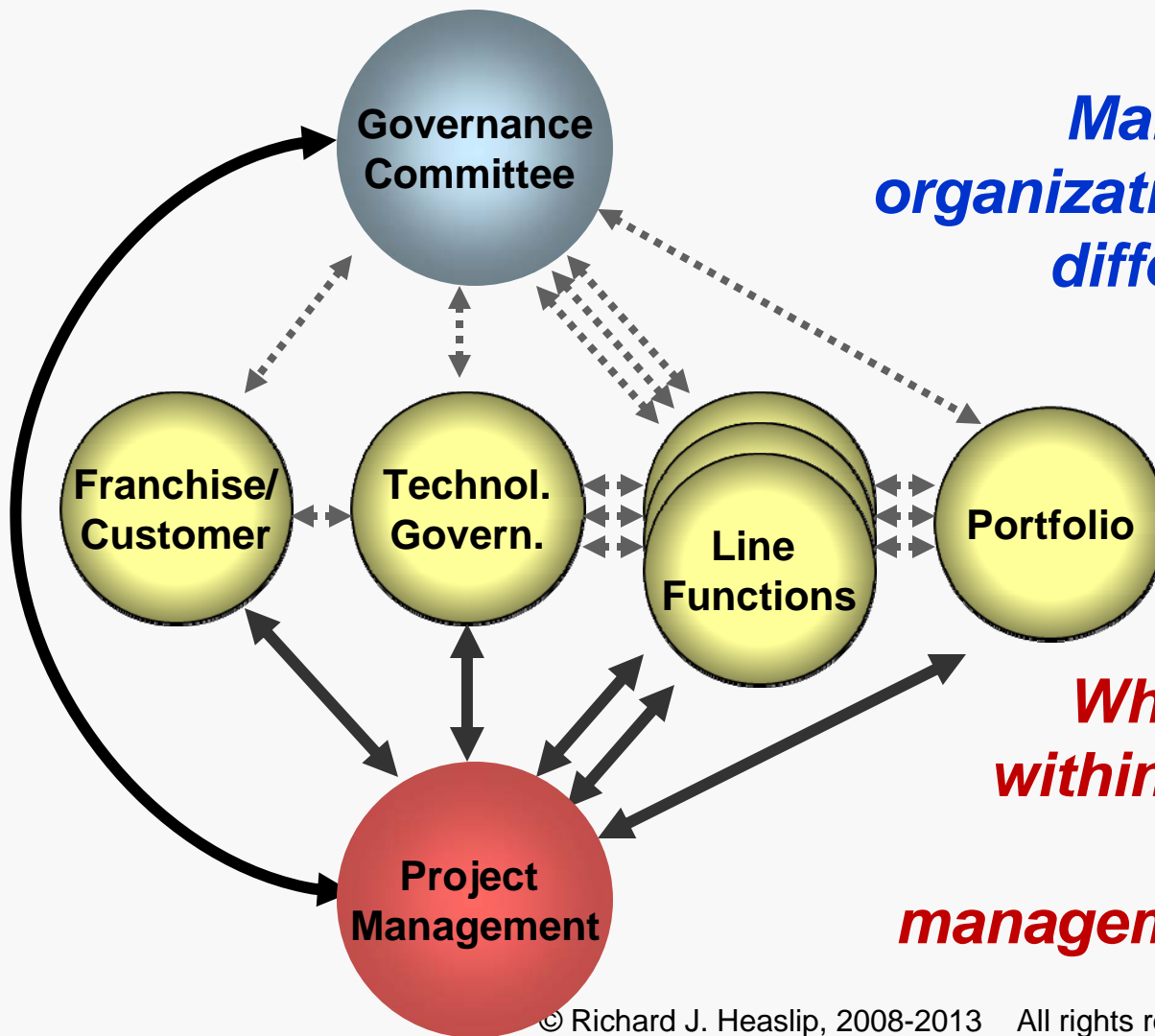
It requires the governance committee to completely understand operational and strategic elements of the entire portfolio of programs / projects
(or be reminded before every decision)

It becomes unwieldy...

- When organizations get big
- When projects are complex

It is not efficient or agile - It stifles innovation!

The Reality of Organizational Complexity



Many governance organizations, each with different roles and perspectives

What is PM's role within very complex organizational management systems?

About the Exasperados...

They oftentimes worked...

...in big companies

...on big projects

...with many people

...on *outcome*-driven projects

...in knowledge-based industries

...on very complex projects

With uncertain:

...organizational dynamics

...operational variance

...stakeholder reactions

...results

...environmental change

...solutions to issues

They worked in complex environments

The Five Types of Project Complexity

Operational

- ▶ Large, complicated, interconnected activity plans
- ▶ Convergence of variance produces uncertainty

Outcome

- ▶ Unprecedented issues, untried solutions
- ▶ Unpredicted outcomes, diverse options

Stakeholder

- ▶ Individual motivations, goals, views
- ▶ Subjective interpretations

Environmental

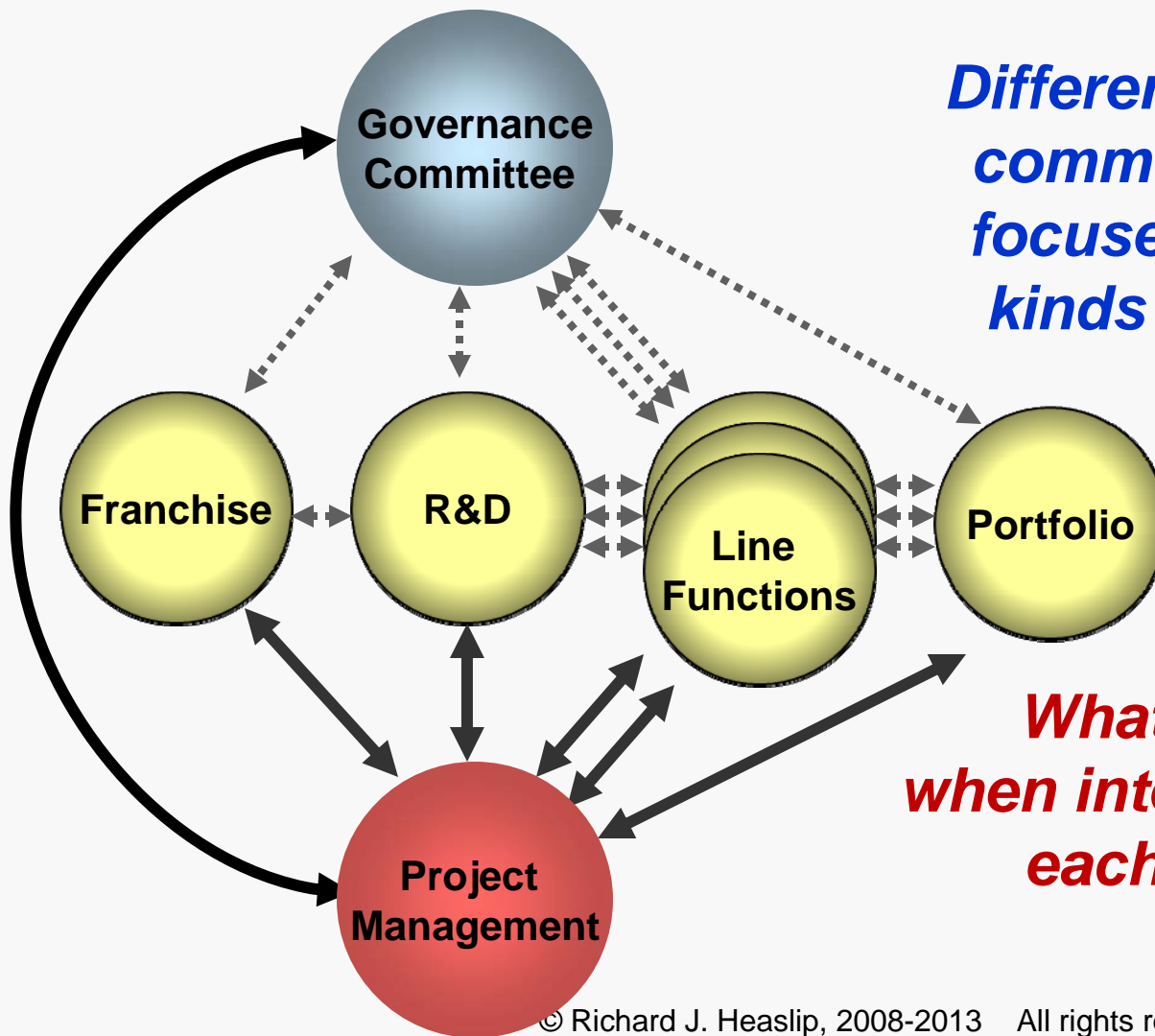
- ▶ Timeframe that allows environmental shifts
- ▶ External, usually not controlled by project

Organizational

- ▶ Many governing groups with independent influence
- ▶ Unpredictable committee behavior

What kinds of complexity are PMs responsible for resolving?

The Reality of Organizational Complexity



Different governance committees, may be focused on different kinds of complexity

What is PM's role when interacting with each governance committee?

Comparing Roles and Their Required Skills

Operationally-focused:

- Well defined plan
- Efficient execution
- Specific outputs
- Quantifiable value

Leadership Needs:

- Efficiently pursue activities
– as planned
- Command and control style
of leadership

Traditionally-focused PM

Outcome-focused:

- Initial plan
- Outcome assessments
- Learned outcomes, re-plan
- Targeted value

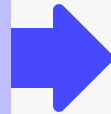
Leadership Needs:

- Continuously assess
learning – adapt plan
- Learn and adapt style of
leadership

Technically-focused PM

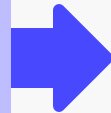
Skills/Knowledge for Managing Project Complexity

Operational



Traditional PM, agile PM, critical chain, six sigma, risk management...

Outcome



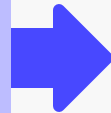
Scientific or technical training, R&D, collaboration skills, decision analysis...

Stakeholder



Negotiation, listening, cultural awareness, stakeholder engagement, communication...

Environmental



Competitive intelligence, market analysis, portfolio management, finance...

Organizational



Organizational processes, SOPs, matrix management, writing & presentation skills...

Managing each requires different knowledge, skills, experience

Questions about PM's Roles

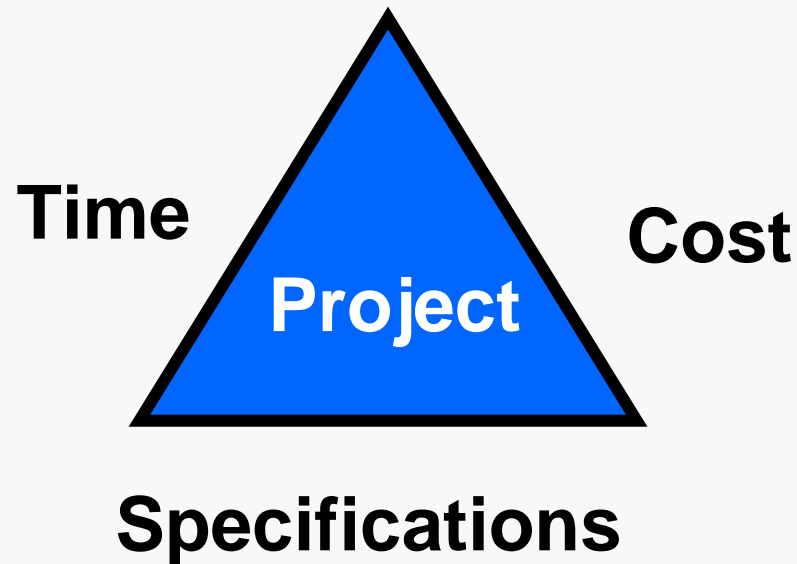
- **Should a PM act principally in an “operational” role?**
- **Are PMs also expected to have technical expertise?**
- **What role should a PM assume when interacting with each of these governance committees?**

- **Are the roles of each team member clear to the team?**
- **Are they clear to the governance committee members?**

How could a broader understanding of the different roles enhance your abilities to advance professionally?

PM's Credo

To deliver on time, on budget, to specifications



The traditional PM “credo” focuses on management of operational complexity

Proposed Revised PM Credo

To deliver on time, on budget, to specifications



***Manage the uncertain; solve the complex;
deliver the value***

Why use complexity-based role definitions?

The role of a PM professional **is to efficiently deliver project benefits and value.**



To efficiently deliver benefits and value, a PM must prevent or manage issues,



To prevent or manage issues, a PM must manage the consequences of uncertainty.



Managing the consequences of uncertainty in modern organizations **is a complex endeavor.**

Use of Complexity-Based Role Definitions

Operational

Outcome

Stakeholder

Environmental

Organizational

Organizational needs:

- Define the kinds of uncertainty and complexity being faced by a project, and their potential impact
- Clearly define responsibilities for managing each of the five different kinds of uncertainty and complexity

Since the industrial era:

We have known PMs must manage operational, and related stakeholder & organizational uncertainty

Use of Complexity-Based Role Definitions

Operational

Outcome

Stakeholder

Environmental

Organizational

Organizational needs:

- Define the kinds of uncertainty and complexity being faced by a project, and their potential impact
- Clearly define responsibilities for managing each of the five different kinds of uncertainty and complexity

Key questions in the knowledge-era:

**Are PMs personally responsible for managing outcome-based uncertainty?
...or environmental uncertainty?**

Current Issues with Complexity Management

Operational

Outcome

Stakeholder

Environmental

Organizational

Stakeholders commonly disagree on what complexity-management roles a given PM group (or a given PM) should have

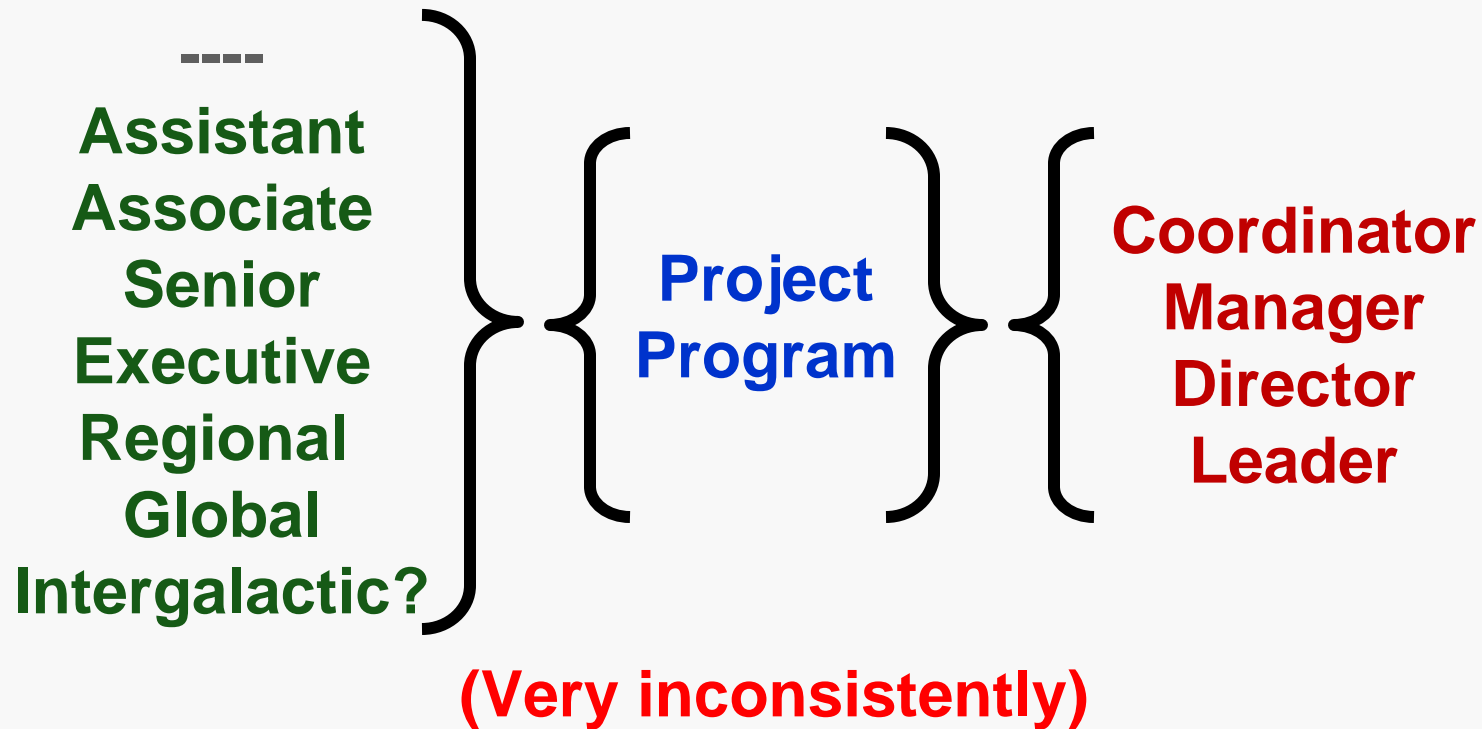
AND... PMs commonly disagree on what roles they want!

Many organizations are confused!

The confusion has led to a PM “identity crisis” that experienced and successful PMs find exasperating.

We have tried to sort it out...

Titles have been used to reflect different responsibilities



PM's Complexity Management Needs

Develop a language for discussing expectations



Examine types of project uncertainty and complexity



Explicitly define who is responsible for managing them



Develop systems for collaboratively managing them

Take charge of resolving the questions!

Developing a Language:

Common Conceptions of “Ideal” Roles and Responsibilities

“Traditionalist” View

- PMs should manage the completion of work according to approved plans
 - Governing committees should retain responsible for authorizing any changes
-

“Operationalist” View





- PMs should manage operational complexity, and associated stakeholder and organizational complexity (but not outcome or environmental complexity)
-

“Inclusivist” View

- PMs should be given a broad mandate to independently manage all project-related uncertainty and complexity

Examine Types of Uncertainty and Complexity

Assessed at inception and when complexity profiles shift

Complexity	Low	Medium	High
Operational			
Outcome			
Stakeholder			
Environmental			
Organizational			

Examine Distribution of Complexity

“Weight” the types of complexity associated with projects

Complexity Type	Project 1	Project 2
Operational	10%	60%
Outcome	45%	20%
Stakeholder	30%	5%
Environmental	5%	5%
Organizational	10%	10%
Magnitude of Complexity	Very High	Medium

Distribution determines required focus of leadership
Magnitude reflects required experience

Explicitly Define Responsibilities

Operational focus:

- Well defined plan
- Efficient execution
- Specific outputs
- Predicted value

Outcome-based focus:

- Initial plan
- Outcome assessments
- Learned outcomes, re-plan
- Targeted value

Leadership Needs:

**Operationally-focused
Project Manager**

(Traditionalist, Operationalist?)

Leadership Needs:

**Technically-focused
Program Leader**

(Inclusivist?)

Outputs vs. Outcomes

Why are the differences so important to PM?

- **Outputs are usually more predictable, and “promisable”**
- **Roles & responsibilities for producing outputs known**

But...

- **Roles and responsibilities of PM for producing outcomes is not as universally understood and accepted**
- **Achieving target outcomes is more uncertain & complex**

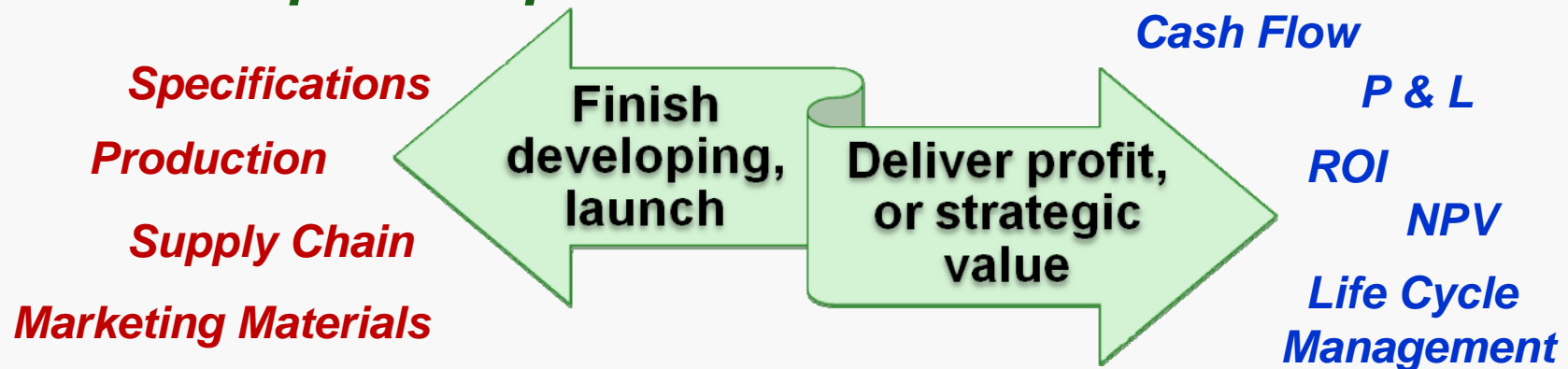
And...

Modern organizations focus increasingly on outcomes!

Improving Goal Definition

- The choices we make in defining our goals may have profound effects on how we approach “projects”

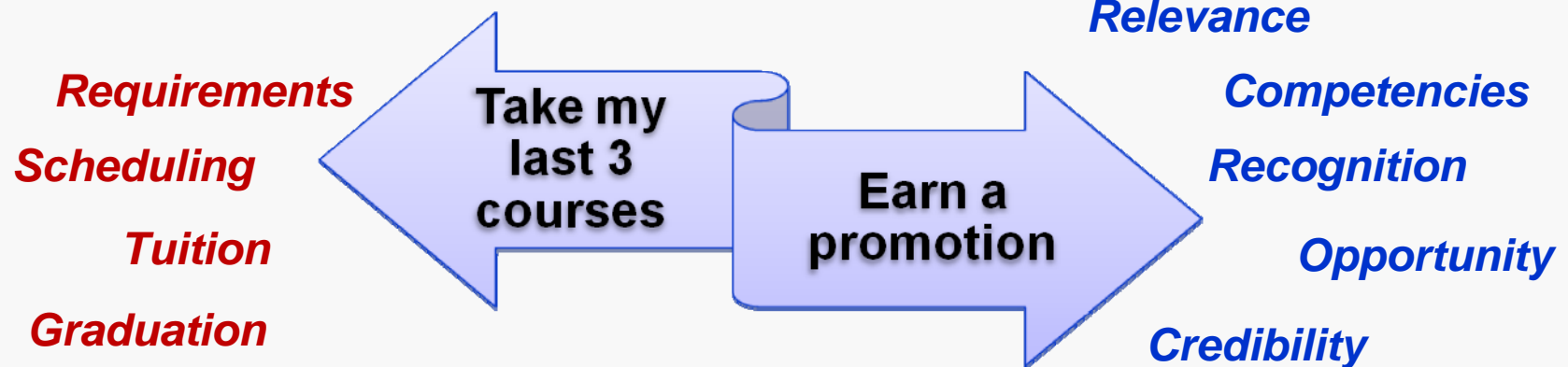
Develop a new product...



Improving Goal Definition

- The choices we make in defining our goals may have profound effects on how we approach “projects”

Finish my Master's degree...



*Output-Focused
Goal Definitions*

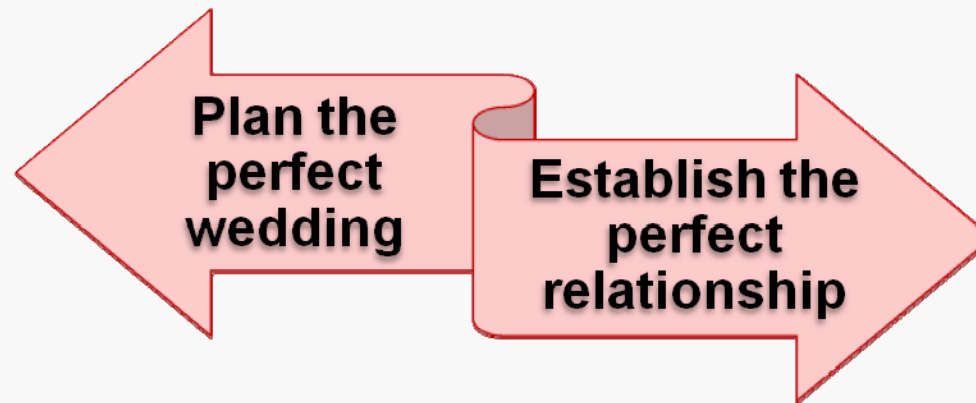


*Outcome-Focused
Goal Definitions*

Improving Goal Definition

- The choices we make in defining our goals may have profound effects on how we approach “projects”

Getting married ...



***Output-Focused
Goal Definitions***



***Outcome-Focused
Goal Definitions***

The roles and responsibilities of an outcome-focused PM are much different from those of an output-focused PM

And so are the knowledge, skills, and experience required for success

And...

Managing either kind of complexity requires different kinds of leadership skills!

Complexity Leadership Theory

New thinking about leadership required in the current “Knowledge Era”, versus the past “Industrial Age”

- Leadership based on managing complexity, not on bureaucracy
- Focuses on use of dynamic and informal processes to manage complexity
- Defines leadership as a dynamic that transcends the capabilities of individuals alone; it is the product of interactions that change perceptions and understanding
- Focuses on establishing conditions that foster innovation and that emphasize creative adaptation based on learning

Proposes that three distinct types of leadership are required: administrative, adaptive, and enabling leadership

Leadership Required for Managing Complexity

Enabling Leadership

- Defines strategy, creates conditions to pursue it
- Facilitates the flow of knowledge & creativity
- Ensures balance: adaptive vs. operational

Adaptive Leadership

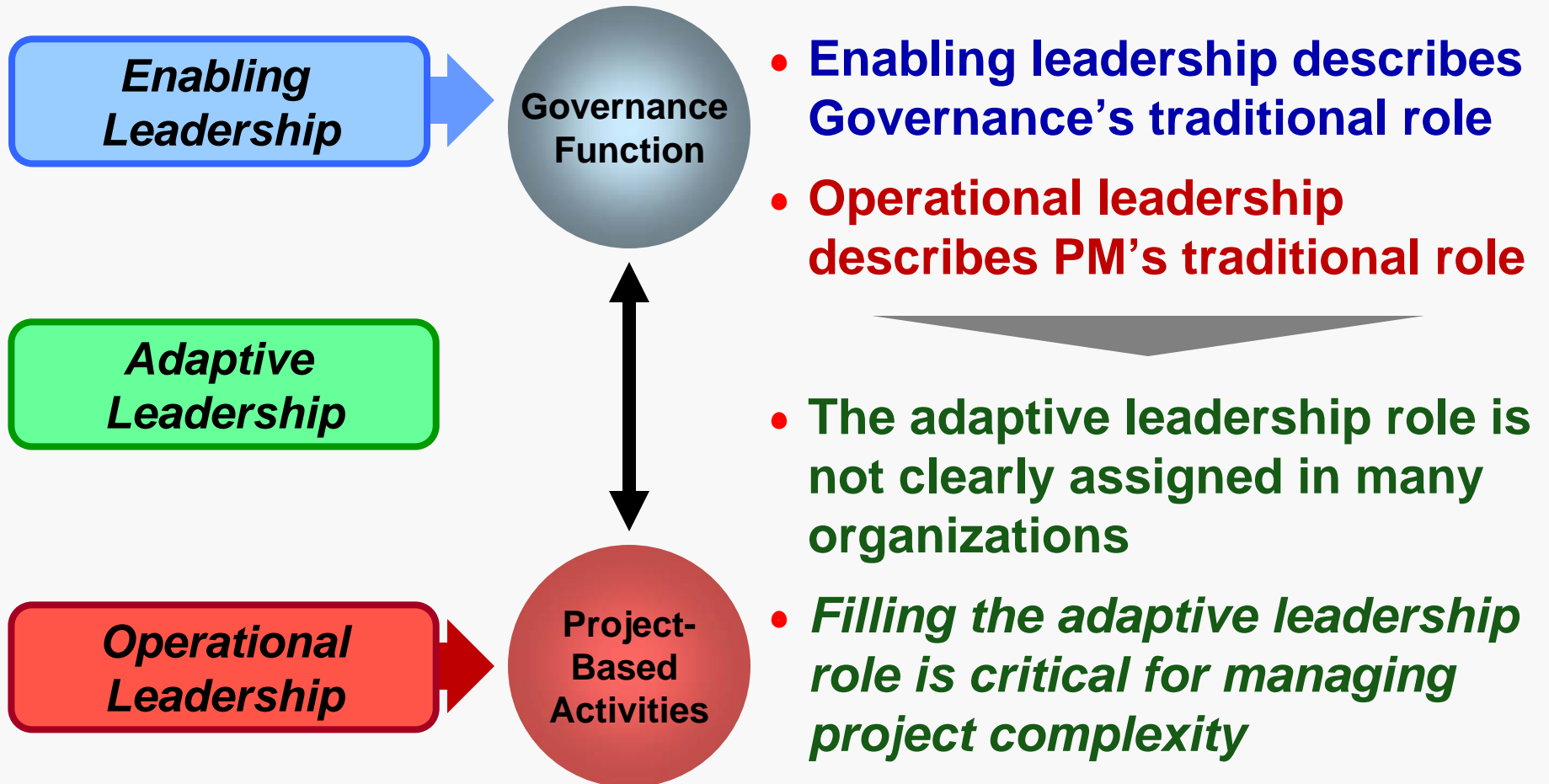
- Recognizes when strategy needs to be adapted
- Catalyzes creative & adaptive responses
- Manages resultant change

Operational Leadership

- Manages functions that complete work
- Manages operational constraints, demands
- Assures alignment, control

**Operational Leadership is referred to as Administrative Leadership in published articles*

Defining Distinct Leadership Responsibilities



Adaptive Leadership Under Different Views

“Traditionalist” View

- Adaptive leadership role not PM’s focus
-

“Operationalist” View

- PM acts as an adaptive leader when managing operational complexity and related stakeholder and organizational complexity
-

“Inclusivist” View

- PM encourage to act as an adaptive leader in managing all forms of project complexity

Organizational Approaches

**“Traditionalist”
View**

**“Operationalist
” View**

**“Inclusivist”
View**

Programmatic Systems:

“First generation”

Traditional PM

“Second generation”

Adaptive PM

Agile PM

Lean PM

Complex PM

Extreme PM...

But... what about the Exasperados?

Why do PMs become exasperated?

Often it's about...

- **Their organizational environments:**
Governing processes, bureaucracy, culture, politics
- **Their need to manage change within that environment**
- **Their desire to demonstrate more leadership**
- **Confusion over their roles and responsibilities**

What are a PM's Roles and Responsibilities???

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Second generation approaches have not been enough.

There is a need for a third-generation programmatic management model that clarifies PM's role in adaptively managing uncertainty and complexity

Key Challenges

- Developing *improved organizational systems* for leading and managing today's complex projects
- Developing *improved understanding of PM's roles and responsibilities as adaptive leaders* within any given programmatic system
- Developing *advanced skills in the leadership of complex endeavors* within programmatic systems
- Becoming recognized for *uniquely advanced understanding of "programmatics science"* (the science of optimizing PM systems) and for the ability to...

Manage uncertainty, solve complexity, deliver value

Recommendations

For your development:

University of Pennsylvania

Masters Degree Programs in Organizational Dynamics

Projects Program and Portfolio Management (P3) Concentration

For your organization's development:

Programmatic Sciences LLC

www.programmaticsciences.com

For expanded discussions, and proposed solutions:

Third Generation Programmatic:

Re-thinking the Management of Complex Endeavors

Author: Richard J Heaslip Ph.D.

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Further discussion? Please contact...

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