

## 74. Seizing Opportunity

### Janet Burns, Thomas Galvin, Frank Saladis

**Tom Galvin:** With the communication campaign in general, the proof is in ultimately the actions, the actions support the word.

**Janet Burns:** Projects are late, they're over budget, they never finish, so they read about a PMO. It's the shiny ball and they say, "We need a PMO."

**Frank Saladis:** It isn't about just time, cost and scope. It's about "Are we doing the right thing?" Okay, so the question should be asked by the Project Manager, "Why are we doing this?"

**Kendall Lott:** Like any skill worth learning, worth getting someone to pay you for, the art of project management is very hard to master. No matter how proficient we become with some of the tools or concepts of the PMBOK®, every project presents unique issues to challenge our expertise and to force us to re-evaluate our assumptions. Expertise is less in knowing what techniques we need to add, but what we might want to take away. As always, the tools are meant to be used to allow us to add value by getting to project completion. They are not an end in themselves.

In this episode, Seizing Opportunity, we talk to expert PMs who know a lot of what to keep and what not to. They've seen a lot and they've learned a lot. Dr. Thomas Galvin gives us the low-down on effective communications strategies, and specifically the PM approach to communications projects, and more broadly a communications campaign.

Janet Burns lays out benefits and tactics of establishing a PMO (Project Management Office) within an organization. And we end with PMI's award winning Project Manager, Frank Saladis, who has coined "the indispensable project manager" – the way to see the PM as a conduit to getting things done. It's the personal professional brand.

**Announcer:** From the Washington DC chapter of the Project Management Institute, this is PM Point of View®, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

**KL:** Retired US army colonel, Dr. Thomas Galvin served 10 years as Special Assistant to the four-star commanders of senior military commands in Bosnia, Germany and Africa. His duties included speech writing, and strategic communication. I met up with him at the US Army War College in Carlisle, Pennsylvania, where he's an assistant professor of Leadership Studies. We focused on his primary interests: organizational change, culture and communication.

**Thomas Galvin (02:26):** When I first got into the area of understanding strategic communication, everything was pushing me towards looking at the single leader and the personal messages of the leader. Everything that I saw in my experiences, from Stabilization Force Bosnia and US Africa Command in particular, was all about how the organization communicated. Because I saw too many

## 74. Seizing Opportunity

times in which the leader's message was not enacted by the organization. The leader's words and the organization's actions were just not together. And it was also frustrating to watch instances where the leader had a well-formed message, but it didn't reach down through the organization, it didn't make sense to the organization. And a lot of times I saw that the message was very well crafted for influencing, or being receptive for stakeholders, but not for changing the way that the organization itself was doing business.

So what were the factors and the conditions that allowed the organization to essentially speak and act as one voice in alignment with the commander's vision?

**(03:42)** An organization who has good self-awareness as an organization is likely to enact messages that are in some way consonant with that identity. And so then when the leader goes off on a tangent without considering how that's going to be received within the organization, that's when you can start having disconnects.

This also gets into the change management side because I had to think about... Well, I've also been part of organizations in which the commander's mandate, essentially their stakeholders, say you're coming in to change the organization

**KL:** I was going to say, it's supposed to be dissonant.

**TG:** It's supposed to be dissonant, but it has to be is dissonant, in a certain way. So, to what extent does dissonance work and when does it not work? It came down to understanding the organization's identity in the first place, in order to counter it in a way that the organization can find acceptable.

**KL:** It has to resonate and be consonant with the organization's culture, meaning their values, or how they're used to hearing the message?

**TG:** All three levels of culture: artifacts, norms & values, and underlying assumptions.

There's a need for the commander to have an understanding of how the organization views itself at all three levels, and the underlying assumptions is the hardest one because that's the deepest level of culture that's mostly hidden. You can see the artifacts and you can say, "I don't like what I'm seeing in terms of the results of how the organization's doing business. We need to do business another way." But if that gets expressed in a way that shows absolute disregard without having dug in and understood what those underlying assumptions are, well then the organization is going to find all sorts of reasons to rebel against it or be ambivalent towards the change.

**KL (05:32):** So how does this actually happen that it works?

**TG:** Well, the example I like to use is US-Africa Command. This is one of the things about strategic communication that I think we overlook, too, is the *time* to actually change minds. I think sometimes we get guilty of thinking that we can do this fairly quickly, but no...

**KL:** I said it, don't you get it?

**TG:** Yeah, something like that. And it takes a long time.

## 74. Seizing Opportunity

First off, Africa Command was being formed in an environment that was openly hostile. Hostile to the creation of the command. And it wasn't just from adversaries. There were questions being raised by the organizations that you might call friends. Basically, there were challenges coming in from other government agencies. For example, there were former ambassadors who were suggesting that this was an absolutely dreadful idea, and were publishing articles to that effect.

So you have to take action. You have to assess, and then you have to take appropriate action. And you have to recognize that sometimes you're going to wind up facing reversals. You have groups of people, an inner circle, whose job it was sort of to monitor what was going on, both internally or externally, and say, "Alright we need to shift to the different direction." Because the messaging is no longer about whether the US is neo-colonizing Africa.

**KL:** Right.

**TG:** It's more of an issue of... Well, we have issues about the way that our militaries...African Militaries...are perceived, and we've got to shift. Instead of trying to make the US look friendly, we've got to put more emphasis on African military as being more professional.

And so the first year was...we were sort of doing a roadshow, trying to express to people that we are not what you think we are. We're not this evil entity out there trying to take over Africa. We are this organization that has been doing a particular mission to help partner militaries professionalize and help Africans solve African problems. All we're doing is we're taking over responsibilities from commands that previously did not have Africa as their number one focus.

So we went through a phase where we were able to get the critics a little bit silenced. And then over the course of a year, it was a year of having activities that demonstrated our point. And then our messaging, which is, instead of trying to get so hurtful about telling them how wrong their wrong opinions were, it was all about, "Look at what we're doing, that's what we're about."

**(08:28):** In the case of AfriComm, we had made it almost a policy not to engage directly against the critics. We prepared it *for* those, but we didn't actively seek out those, because in essence what we wanted to do is to ensure that we got our message out and didn't spend so much time defending ourselves. And this plays into a lot of how I started to separate out the different functions of the campaign.

There's the portion where you're promoting your narrative, there's a portion where you're defending yourself, there's the part where you are actually on the offense, targeting other organizations. I like to use a sports analogy for this. And football, American football, is a good one to use because you have very distinct roles of offense and defense. And so the object is to win. That's essentially the ultimate promotion of your narrative – that you're superior to the other team.

**KL:** Right.

**TG:** But in the process of pursuing that you have to balance, or address the particular environments of offense and defense, and that is targeting the narrative of other of your opponents, who may be your friends, who are trying to steer you in a direction you don't want to go, and defending against their offensive actions.

## 74. Seizing Opportunity

Do you decide that you're going to take a very confrontational approach and say, "Your message is wrong?" Or do you accommodate? Do you say that, "Okay, you are partially right. We're going to go ahead and change ourselves in order to accommodate what the criticism is."

You can see a lot of that in crisis. If you have a crisis, and you realize that you did something wrong and you're going to change the organization, but you want to still do it on your own terms. You don't want to do it on other people's terms. And then you have the other form of defense, which is essentially talk to the hand.

**KL:** Don't let them set the narrative that you're responding to.

**TG:** Yeah, don't even acknowledge it, because acknowledging it merely emboldens them and wastes your time. So you have to decide, how are you going to try to take all of that noise, get it cast aside, and get back to what you really want, which is to win the game, promote your narrative.

**KL (11:02):** You talk about knowing the organization's narrative. So explain that a little bit to me about the comparison of a need for something, that is change, from the executive layer, that is strategic, as it plays against the org's narrative. What do you mean by the org's narrative here?

**TG:** Well, the organization's narrative is the entire life history of the organization. So basically, if I'm going into an organization, or I'm advising people within an organization, what I want them to do is, I want them to basically reconstruct an approximation of the narrative. And I do that with basically two things: One is to look at the elements of organizational identity. I use that as a framework. What is the central character of the organization? How does the organization view itself as distinct from other organizations? In military organizations, we have a hell a lot of infantry units, okay? But we distinguish them by their name, by their number, by their heritage, the streamers, the battle streamers, like the Modern First Battalion of the 10<sup>th</sup>, whatever, Infantry probably doesn't have very much to do with the one that fought in the Civil War. There's a lot of distance there...

**KL:** A lot has happened.

**TG:** But that's heritage, and heritage in military organizations is very important. So how the First of the 10th distinguishes itself from the Second of the 10th is actually very important to the organization. That's part of its narrative.

And then the other one is how the organization views its own history. How do we, in a modern professional army, all-volunteer army, connect with what was essentially a very different kind of an army back in the Revolutionary War, or the Civil War, or the World Wars?

**KL(13:01):** A new executive is trying to put out new messaging, messaging that's contemporary to some issues that are happening now. How would you then suggest that they align that with that concept of heritage?

**TG:** It then becomes a matter of, alright, "Where does the heritage come from?" And, "Where does what I see to be either right or wrong with the organization, how does it align with the way that the organization sees its heritage?"

**KL:** This is getting down to the values and norms, then...

## 74. Seizing Opportunity

**TG:** We're down to the value and norms. And this also gets into the second part, image, projected image. And this is where perhaps what I'm doing is very peculiar to military organizations. I don't know how well this translates, but what I have developed here is kind of a taxonomy of competitive advantage for military organizations. And the way that it works is pretty simple. You have like eight characteristics of ways in which a military organization compares itself to other organizations. And the idea is to kind of get at that answer that, given a potential future conflict, how do we think we would prevail and in what way? So if we have more troops than the opponent. We have a... We basically have a quantitative advantage.

**KL:** Right.

**TG:** We are bigger than you or we are more populous than you and therefore we will beat you.

There's qualitative advantage: We've got bigger tanks, guns, ships, whatever. Qualitative is another way, we are superior in some way. So based on our values, and that because we have this qualitative advantage we are superior to you.

I won't go through all eight. But the idea is, is that with this taxonomy, we kind of understand not just how we project ourselves, you know, what do we consider... what do we consider to be the kind of messages that the organization will rally around as we promote it?

And so there, if a leader comes in and sees that the organization is not rallying around the message, then you either have a problem with what the message is, in terms of how it aligns with the identity of the organization, or is it something that is not expressing the competitive advantage you think it should?

**KL (15:26):** Project managers may have to themselves message about the role that they're performing, or the product that they're producing, to multiple stakeholders. So if they're seeing that, thinking... I need to tell everybody why this VP has given me this authority, this money and told me to go make this thing happen. And I feel like I'm fighting everybody all the time. How can they begin to actually walk through this?

**TG:** Well, I'm going to assume that the project manager is there to fix a problem, right? So, what is the problem from the leader's perspective? But also, how is the problem perceived by the organization? Does the rank and file actually see the problem at all? That's actually a question.

**KL:** Right.

**TG:** Because if it's not a problem at their level or if they're seeing a completely different problem, now what you can do is you can figure out, "Alright, where's the disconnect and what's causing the disconnect?"

One of the other things about organization identity, it's multi-level. So you have the whole organization has an identity; HR is going to have its identity; marketing, they're going to have their own identities, they'll have their own culture, they'll have their own way of communicating, what resonates. What is it of these aspects of identity and image can the project manager use fairly efficiently to try to characterize the problem, in terms that the organization can find acceptable?

## 74. Seizing Opportunity

Because it makes it a lot easier for them to accept not just the change, but also the people who are doing the change.

So the project manager is an external consultant.

**KL:** Often. Or a matrixed person with inside the organization. There can be a variation in their identity that takes them out of a chain of command, in a meaningful way...

**TG:** Right, and it's either/or. It's basically the same thing.

**KL:** So what are they going to watch for here?

**TG:** What they've got to watch for here is the counter-narrative that basically said that they are just simply being resisted against because they exist. "You are here to disrupt my life."

**KL:** What would you say is the way to start tackling that from a strategic communications perspective?

**TG:** The expectations of what the consultant, external or internal, is going to do, it does have to be a very, very formal agreement between the consultant and the leader, to say, "This is what you're going to do." And then that has to be communicated from the leadership, not from the consultant. But certainly the things that you always want to be careful about is to, in any way, highlight the fact that you are answering directly to the boss. You've got to almost distance yourself from that perspective. If you want to build trust with the organization you have to approach things very non-threateningly. That's something that you have to demonstrate. You can't plead your case, you've got to prove it. But it's the same way with the communication campaign in general, the proof is in ultimately the actions. The actions support the word.

**KL (18:20):** You talk about these as campaigns. Why campaign?

**TG:** It has all of the elements of a military campaign, which is a clear goal; a way towards the goal. What is it precisely that you want to change, and what does everybody have to do in order to get us there? To call it a plan is not really accurate, because plans assume that you know what means you require. You don't know what the path to the end state is. The campaign has to be dynamic so that as the situation changes, you're adapting the messages, you're adapting the actions and the activities of the organization. You're trying to keep the organization oriented towards that goal.

**KL:** You know the old saying, "Actions speak louder than words." Keep that in mind when you're developing your communications strategy. Make sure you have a grasp of the organization's identity and culture so your messages resonate. Be prepared to adjust your message to meet the needs of real-time circumstances, and strategy.

You can find Dr. Galvin on LinkedIn: Tom Galvin. Or contact him at [Thomas.P.Galvin.Civ@mail.mil](mailto:Thomas.P.Galvin.Civ@mail.mil).

**KL:** Janet Burns has over 20 years' experience in the project management field. She's president of JB Worldwide, a project management consulting and training firm, specializing in PMO development and maturity improvement. Janet has set up PMOs at high-profile organizations,

## 74. Seizing Opportunity

including The New York Times, and M TV. She's currently serving as the President of the Delaware Valley Chapter of PMI.

**KL (20:09):** We hear a lot about PMOs, Program Management Offices. But when I was first introduced to project management, the PMO was more commonly referred to as Project Management Office. And I recognized they're different. So we don't talk about these a lot anymore. It seemed like kind of old school almost, but obviously, it's very important. Tell us what a PMO is in this point, and why any organization should consider having it.

**Janet Burns:** Okay, so when I talk about a PMO, I generally mean Project Management Office versus Program Management Office. And what I mean is a center of excellence, an organization that can help the rest of the enterprise get better at projects. And how they do that can vary, and I think it has to vary, depending on what the organization needs, how much they can tolerate, where their pain points are. So what a particular PMO in an organization does, I think, has to match what the organization needs.

I have been myself a PMO of one. In fact, I took a job as a PMO Director for The New York Times in their shared services center in Virginia, and I forgot to ask how many project managers were there. And when I got there, I asked that question and the answer was zero. There were really just functional technical managers, who were running projects, and they wanted somebody to come in and create standards, mentor those people, help them run projects better.

**KL (21:52):** What is my selection? If I'm looking at the buffet of things that can be in a PMO, what are we looking at here?

**JB:** I think first and foremost would be some sort of standard methodology, to get to that point where people are using the same language, or defining projects using the same document, like a charter. So that I think is a key thing. It could be software tools, something like an enterprise project management tool like Clarity or Project Server. It could be training. It could be assistance and mentoring.

So I've been part of PMOs, or worked with PMOs, where they had people help projects kick off and actually mentor the Project Manager in the planning phase, and then kind of go on to the next project.

Portfolio management is up and coming within PMOs. So not just managing how the projects run, but managing which projects they select, and keeping the balance of those projects that they select.

**KL:** What's needed for that? That's a leap for PMs... because I'm thinking of the PMBOK® and some of the introductory pages, where they describe the role of portfolio and program and project and product life cycles and things. This is interesting that the PMO is making that leap to the portfolio, but that makes some sense, because that's actually about the project selection, itself.

**JB:** Right.

**KL:** What do PMOs capture to be able to help drive that kind of decision, though?

**JB:** Two things. The first is selecting the right projects, right? So there's an old saying that project

## 74. Seizing Opportunity

management is doing projects right, and project portfolio management is doing the right projects.

**KL:** Right.

**JB:** So project selection as the first part. So the PMO can facilitate that by creating a process to do that. Is this a good fit for the organization? Do we have the right resource capability? Is it within the core competency of our organization?

**KL:** They can peer inside the project instead of just looking at it as an investment; it's what goes on to make it happen. Because we manage, we plan, execute, monitor in that manner, we can speak to this. We can say, "By the way, this may be a great deal. Understand it's very complex relative to the maturity of the people around you."

**JB:** Right. So there's typically a scale of five or six criteria that you can use to figure out whether or not a project should be selected. So that's the first part.

**JB (24:30):** And then the second part is, as the project is moving forward, so let's assume the project's been selected, and it's in an initiation or planning phase, collecting the status and looking at whether or not that is still a good project.

So that's part of the methodology that the PMO has. But from a portfolio perspective, a group of people should always be looking at that group of projects and saying, "Should we still be doing these projects? This project is a million dollars behind, and it's six months behind schedule. Is it still the right project to do or should we shelve this one and do another one? Because things have changed in the business climate."

**KL:** So in my terminology as I understand, or the terminology I use, I should say, that would be governance. Someone's managing but now I'm kind of wondering if this is all good for us to still be doing. You get feedback, and then you feed that back into the loop to say, "Stop doing that one, do this one. This one had better be accelerated or we're not going to get something else we need." Whatever.

**JB:** Right.

**KL:** So it's that kind of oversight. And you're saying the PMO would provide that, or they provide the data to the executive to make that decision?

**JB:** They're facilitating it. So I worked with a financial institution where we started that process. So we started the selection process, they selected projects based on some clear criteria. We had a portfolio of about 18 projects, and then we created a standard reporting process on them, a dashboard. And we had a steering committee of the primary executives, about 10 people, and at the first few meetings they didn't really ask a lot of questions. And then all of a sudden, they started looking at the data and saying, "Why is this project on schedule but you haven't spent the budget? What's going on there?" And they really started to ask the right questions once they were presented the data, and that's what the PMO provided.

So, the PMO is governing that process because it's got to be standard, but they're using the C-suite to help make the decisions on whether that project proceeds. So I think that's the two-tier part of



## 74. Seizing Opportunity

portfolio management. It's really the selection, and then the ongoing management and decision-making of the portfolios.

**KL (27:07):** What's your thesis around these PMOs?

**JB:** They're not cookie-cutter; you can't make them all the same. There are maturity models out there, like CMMI and OPM3, PMI's maturity model, that say you must do everything on this list from 1 to 10 to be a Level One, and you must do everything on this list to be a Level Two.

The problem is, some of those things on that list aren't important to people, so they don't want to do some of those activities. They may not care that much about resource allocation. And the standard maturity models will say, "Well you have to at least be doing good resource capacity planning to be a Level Two maturity level." But maybe an organization doesn't care about that. Maybe they know who all their resources are and that it's not as something that they have to plan.

**KL:** What triggers someone to call you? I mean, as a consultant, you get called, right?

**JB:** Right,

**KL:** So what gets you the phone call then?

**JB:** Usually, the phone call is because the projects are performing poorly.

**KL:** And they can tell that.

**JB:** And they can tell that. They're late, they're over budget, they never finish. There's a lot of conflict on projects... So they read about a PMO. It's the shiny ball. And they say, "We need a PMO." And some organizations will come in with a planned PMO process, like PMO-In-A-Box, and they'll give them that PMO. But what they haven't done is Root Cause Analysis.

Why are their projects turning out poorly? And I would say it's not the same in every organization. I hear a lot of the same reasons. The stakeholders aren't involved, and... you've seen a lot of the surveys... but I think it has a lot to do, also, with the culture of the organization.

**KL:** One of the biggest ones they find in the surveys, for example, is what you just said, is the role of leadership and its engagement. And I found that interesting, because that wasn't true in the past. You didn't see it as much. It has come out in some of the more recent PMI documentation, and it makes me pause a bit, because I get concerned when we say as a profession, one of the reasons we're not doing well is because somebody else, fill in the blank...

**JB:** Right.

**KL:** Isn't, didn't, won't... So how have you seen that role of the involvement of the senior leadership? How important is it? Is it a good excuse, is it a good reason, is it a real thing?

**JB:** I've seen it all different ways. I've seen it be very visible and strong and forceful, and that's definitely helpful. I've seen it be... not so much there... it's more of a grassroots efforts. I hear a lot of PMs say, "I have accountability, but no responsibility, or vice versa, and I always tell them to act

## 74. Seizing Opportunity

as if they have responsibility.

It's obviously better if senior management supports it, but it's best if they support the notion of a PMO and they're willing to be open to how that PMO is implemented, and what they're going to use, what components like we talked about, the cafeteria system, which one should I use and what should I use first?

**KL (30:45)** How do you end up engaging with them around that to make those decisions?

**JB:** Discovery. A lot of asking question. A lot of finding out about how the culture works, how are decisions made, how do people interact.

**KL:** You said culture earlier. So are you looking at decision making and communication or interaction?

**JB:** Yeah.

**KL:** So what do you find in those cases, what are some examples of how that varies? Because those are the things we need to be thinking about if we, as listeners...

**JB:** Right.

**KL:** ...are thinking, well maybe I need a PMO. We haven't really done that here.

**JB:** Right.

**KL:** What have you observed?

**JB:** I think some of the things are, Is the culture formal? Are there documented procedures in other areas? So, can you implement a formal methodology that people will use? Are people used to following documentation? Is the culture more informal? Collegial? You know, people don't like to write things down, but they sit down and talk and make decisions and they get along well and they do things well as a team, but it's not in a very formal manner.

Immature organizations, immature in project management, they're usually those kind of organizations. They're more creative, they're more off the cuff, they're more collegial. They work well together, but they don't do process.

**JB (32:19):** I think any PMO, by its nature, is always going to change the culture to some extent. But it has to align to the culture in terms of the amount of rigor, the structure of it. There was the word that I always used, a made up word called adhocracies. Organizations where just whoever is in front of the group, that's how a project is run. There's no standardization. That's a factor of the culture.

But, if you're going to change that and you're going to try to implement some process and some rigor, then you are also going to change the culture a little bit. But you have to do it in a way that fits the culture. So let me give you an example.

## 74. Seizing Opportunity

I worked for MTV for a while and implemented a PMO there. So we started out with status reporting, because there were projects going on, and the statuses were being written every two weeks, and then they would just write over them the next two weeks. So there was no continuation of “how’s the project doing?” versus two weeks ago. So we kind of fixed that up, and then we started... Where I usually do at the beginning is doing a better job of defining the project. So in organizations that are more casual and informal, they don't write things down. So having a simple charter is a good way to try to do that, and it has to be very simple in organizations like that. If a consultant would come to me with a 20-page charter template, I would just tell them to go away. It's got to be simple, one page if possible. So we came up with a charter at MTV, and the group wanted to call it a Creative Brief.

**KL:** Who was the audience for these charters?

**JB:** It was corporate IT. And at that point I was a PMI stick-to-the PMBOK®. My job here is to standardize things...

**KL:** I feel you've changed.

**JB:** Yes. And these are the things that have changed me, right? So I said, "Okay let me see a Creative Brief. And guess what it looked like? It looked like a project charter. So even corporate IT, it kind of assumes the core culture of the organization.

And my job was not to make them use a document called a charter because it's called a charter. My job was to make them do a better job upfront defining their projects. And if they were happy, or more comfortable doing that as a creative brief, then my job was done.

So that's an example of adapting to the culture. But still, changing the culture, I had to make them do the charters, and then keep referring to the charters. I've had this with a couple of organizations. You start with a new process, and they follow along, but as soon as you leave, they stop.

**KL:** Because?

**JB:** Because there's not enough stickiness, I think that's organizational change management.

**KL:** Yeah, that's the culture side.

**JB:** Yeah.

**KL:** You seem to be hitting an older dichotomy of form versus function. You can talk PMBOK® or some other method to get to the form, but the real key is the function.

**JB:** Right.

**KL:** They needed a way to share the... what we think this thing we're investing in is, and what we're going to get out of it. We call it a charter. You call a Creative Brief. That may be its form, but the function is still to define some level of scope and commitment I guess, the core ideas around it.

**KL (36:29):** So what are some of the things that you have seen that cause PMOs not to be working?

## 74. Seizing Opportunity

**JB:** I find that they don't know how to apply organizational change management to what they're doing.

**KL:** Okay.

**JB:** So we're talking about the culture change and the organizational change. They create a methodology, they put it out there, they have some people doing some training, and they expect everybody to follow it. They don't do the assessment of, what..where...will this work? Who are the resisters? Who are the people that are advocates, that I should use more to help me sell this? They think it's a quick set up and everybody will follow.

And one of the things I find with project management, and with PMOs is that senior executives don't like to admit they don't know what project management is.

**KL:** How do you know when they're faking it or when you're seeing a resistance at the executive level?

**JB:** Either they'll gloss over something in a meeting, or they won't, or they'll say they don't need to come to a meeting, they don't need to participate in let's say a session to create a work breakdown structure or something that you're trying to get them engaged in.

So I have a sponsor on a project that I'm on, who's actually very, very open to learning. I created a RACI chart for something that I'm working on...

**KL:** So Responsibility, Accountability...

**JB:** Consult and informed. Right. And I tweaked it a little bit, actually, to use their terminology, which is typical of fitting the culture.

**KL:** Makes it easier.

**JB:** Right. And I wanted to show him what I was working on. So I said, "This is kind of a process improvement project." So I said, "Here's all the processes. Here's who owns all the processes, here is who's accountable. And as we finish documenting and improving these processes, this is who will review the processes. This is called a RACI chart." And he goes, "Oh, I like that. I could use that for some other things." So I didn't go in assuming that he knew, and I snuck in a little training without him knowing it.

**KL:** Gave him something valuable he can use them.

**JB:** Yeah, so that's what I tell PMs to do. When you're...even a project charter...if you're bringing that to a meeting, just explain, the sections of the charter are this, and this is what a dependency is, and this is what an assumption is.

**KL(39:11):** You know, what I hear you're saying is that the need for a PMO is driven by the problem that our projects aren't delivering what we want. And that's observable, outside of the PMs or people who are acting in a PM role. So that's one point, you have to address. And then

## 74. Seizing Opportunity

fundamentally, it's education. It's really kind of educating people, which could include some formal training.

**JB:** Right.

**KL:** But there's a fundamental... Then you've recognized a value problem, a business problem, with this suite of tools around this discipline, and now I need to start educating everybody who touches this in some way. Better PMs, a leader, the executive layer, the people who have to touch the product.

**JB:** Right.

**KL:** You begin to unfold. It's an education process, which you're highlighting here. With the goal that our projects now deliver.

**JB:** Right, that's a really good point. And I think that's part of organizational change is constant education.

**KL (40:13):** This is really about getting the suite of projects, the collection done. So it's one thing to say, "We need to get value out of our projects and we will select from this list of best practices." But there's another thing to say, "I'd like you to do that," says you the consultant. "But I would also like you to see it as a roadmap of change." Meaning build-your-own maturity model is a little different, which is an agreement that there's...Maturity Model in my mind means there's a state now, when we select some stuff we'll do, and we know later we will select other things, replace things, or add things.

**JB:** Yup.

**KL:** So you are suggesting more than build a PMO that's good for you, like tailored clothes right? More than that, you're also suggesting, recognizing you will change grow and mature, and so your clothing will change, your selections will change.

**JB:** Yup, exactly, it's a road map and it's a strategy. And where you want to be today is not where you're going to want to be next year.

**KL (41:17):** What is your word of advice to a project manager, who may have peers in an organization, and they're wondering why don't we have a PMO? Where is our portfolio? How do I fit in? What is your recommendation? They're working on projects and they're not sure if they're the ones with the value. They're not sure where they're sitting on that. How do they need to hear and engage with the function that a PMO would provide?

**JB:** Right. I think they need to start to make it more visible, the things that they're doing, and the things that they will...they think will resonate. I think they need to take that culture lesson from me. Like, what do I hear my executive talking about all the time? And if I start talking about that on my project or for this portfolio, maybe they'll listen to me. I know a couple of big companies, they have some people that are just keeping communities of practice alive.

**KL:** So self-organizing a bit here.

## 74. Seizing Opportunity

**JB:** Yeah. Yes! And I think that as they keep doing that, if we go back to them a year from now, that will have morphed probably into an enterprise PMO.

**KL:** So within an organization, a project management office can serve to standardize processes and methodologies, as well as to provide data to executives to facilitate the selection and ongoing evaluation of projects. But remember: No two organizations are the same. So you have to tailor your PMO to fit your organization's need. It's not a go-to plan without a purpose.

You can connect with Janet Burns on LinkedIn.

**KL (43:11):** Frank Saladis has the distinction of being one of only two people to be named PMI Person of the Year – that was in 2006 – PMI Fellow, 2013, and receive PMI's Distinguished Contribution award, 2015. He was president of the New York City Chapter of PMI for over a decade, and is a founder of International Project Management Day. I am pleased to share with you this interview, which I conducted with him while he was at PMI's International Leadership meeting in LA, back in 2018. The primary focus of our conversation: the Indispensable Project Manager.

**KL:** So tell me about the Indispensable Project Manager. What's your thesis there?

**Frank Saladis:** So instead of making project management indispensable, we need to focus on making sure that the project manager is considered indispensable for business results.

**KL:** Because they're applying the skills so well? Or do you see another layer beyond how they execute the skills that they need to start paying attention to?

**FS:** This is where it gets into, not necessarily the emphasis on only technical project management skills, such as managing budget, and scope and cost and things, but to get the project manager to be connected to the fact that the goal is to create business value. Project managers should develop a reputation, more specifically a brand, that differentiates them from others in the organization in that they are in the process of producing value, not only for the customer that they're dealing with, but for the company that they're dealing with and also for the people that are working on the project.

Now the basic principle behind this would be, Number One, if you personally, and I'm talking about the project manager, if you as an individual are consistently producing value to your organization and to your customers, that people will take note of that. And this, just like in any business that produces products that are viewed as... as of high value, that continuous production of value creates brand, brand recognition.

So the brand recognition comes from doing work that others have noticed and keep coming back to you. And from a project manager perspective, what we do want is for people to come back to the project manager, based on that value that they're producing, and get them to be involved in other things.

Now, if you have people consistently coming back to you, then you have now established brand. People know about you, they know about your reputation, they know about the work that you do. That accomplishment of being known for your work, or that brand, which is your personal brand, is an indication of success. So it's pretty much kind of like a cycle: producing value generates brand

## 74. Seizing Opportunity

recognition, brand recognition indicates success, continued success requires you to continue to produce value. And that is the premise behind the Indispensable Project Manager.

**KL (46:37):** That would be true in I think, in any profession, what you just laid out. What is it about project managers that we need to highlight that perhaps was not being highlighted?

**FS:** If you think about the reputation of project managers and the perception that some people have of project managers, it is not necessarily attractive or complimentary. In fact I do an exercise where I ask project managers, what are all the negative things that people say about project managers? And then we have to take a look at that, and take a real true hard look at why do people perceive project managers the way they do? And I can say that...sum that up by saying that you've probably heard somebody at some point in time say, "Oh no, don't make a project out of this." Giving us the perception that, you know, oh, no, now that it's a project, we're going to have so many problems, it'll be so complex and so on.

And then we have project managers that kind of force process onto people, and they get very picky about what has to be done, and they don't necessarily focus on the human side of things. And what I suggest here is our reputation should not be one of being disciplinarians and control freaks and schedule drivers. That we should be known as integrators, coordinators, facilitators, problem solvers, resources and things like that. And if we can drive that behavior, then we're talking about how we can create a strong relationship with functional managers to get the job done, and also improve our own personal reputation and brand.

So it's really focusing on being excellent in what we do. Get people to not see a project manager as an obstacle, but to see a project manager as a conduit to get things done.

**KL(48:42):** We spent time trying to create identity, which was that there in fact is a knowledge base, and that there are tools and templates and methods and ways of being, ways of doing. And that that was probably the emphasis because it was early in its development. And there's a sense to me now, from what I'm hearing from you, is that it's a maturation...that we have to go to the next step. So is the problem then that we're at a maturity? Is that a legitimate way to see this? And now it's time to start teaching and training at that next level? You're talking about it as excellent. I'm wondering if it now needs to be embedded as the requirement.

**FS:** The way project management has been taught... What's needed here, and I guess we could call it kind of a paradigm shift, that we do have to go to the next level. Okay? And I can use an example, the Project Management Institute's Educational Foundation is actually doing that by introducing these programs that focus on project management, creating what we call Skills for Life. So that if we can incorporate project management type skills, which include leadership, planning, management, problem solving – there's a whole array of these skills that are soft skills and more technical skills – that they are going to have a better chance for success in whatever business they ultimately decide to go into.

So we do have to change our approach that project management is – and I know this is happening – it's not just on time, within budget, according to scope like we have been taught multiple times. It's really about being able to see opportunity. It's to have a certain amount of agility to make decisions that are going to be beneficial, to accept change more willingly, things like that, that provide a good balance between leadership and management towards what we call value creation benefits

## 74. Seizing Opportunity

realization, and an all-around approach where what we have is pretty much delighted customers, delighted organizational managers, and delighted team members. And I think that we need to put a lot more emphasis on that in terms of our execution and the outcomes.

**KL (51:10):** When are we going to start getting that training then? Because I don't think that's taught in the PMBOK® strictly, and it's certainly not tested for, which means it ends up not getting trained for at the core level. Is this a call to arms for our REPs to step it up? Or that something should change, in terms of PMBOK® 7 eventually, or in terms of the certification process?

**FS:** Well, I think that it's getting there, because, you know PMI, a few years back, created the Talent Triangle – there's leadership, there's the strategic side and the technical side. So now what they're saying is you, to be a truly effective project manager, need to be in this continuous development, professional development cycle, that we have to emphasize, you are in fact put in a leadership position, but you do have to have certain technical skills. Not that you need to be the technical expert, but some technical credibility, and I'd also make sure that you understand that any project, any project at all, basically, is a financial investment. And therefore we need to have some business savvy and intelligence in order to really bring that all together.

So I think that you're seeing some more emphasis on soft skills. But we do have to make sure that people understand it's a balance. And if we can have that balance, then I would say that project managers of today and tomorrow would be much more, what we'll call indispensable, than some other resources that might be in the organization.

**KL (52:47):** So there's this idea that a project is an investment on behalf of the organization. And we're hearing that a lot on our podcast episodes, as well, as our guests speak to that. But as soon as I start hearing about counting the benefits and all, I immediately think of how that's a process, and how that's such a PM response. A benefits register, right? So we've got another top-line thing, we're going to decompose and address. Is it really the project manager's job to address the benefits? Because they're working on something that is a temporary endeavor to produce the thing that was required. Now *it* has to produce a benefit.

How do you see the role of the project manager in actually tackling value from that perspective? I see from a brand, I see that from recognition of... You helped me get it done. I like you. Help me with the next thing. I'm getting that sustained success concept, but I'm wondering about the value calculation and the ownership of the value problem. Where do you see that stopping and starting with the project managers?

**FS:** Well, I think that if a project manager is given a project, there had to be a specific reason why that project was approved in the first place. So the project manager now has to go back and say, "Okay let me make sure I understand that there is a mechanism to get it done and produce a deliverable, and I can certainly do that." But that's mechanical, okay? We have something, we do all these tasks, we get it done, and we move on. And this is where we run into some trouble. If you provide the customer the *planned* result, you may not necessarily make your customer happy. The project manager needs to focus on the *desired* result.

What does the customer really need here? And I need to make sure that I deliver what they need, meaning, that I have to be conscious of change, I have to be conscious of opportunity, I have to be conscious of why the customer needed it in the first place. And then I have to do it in such a way



## 74. Seizing Opportunity

that I'm going to impress the customer. Because if I impress the customer, the customer comes back to my organization to ask for more.

Okay? And we continue the value stream that goes on there. So it isn't about just time, cost and scope. It's about, "Are we doing the right thing?" So the question should be asked by the Project Manager of "Why are we doing this?" And then once we know why we're doing it, we have an understanding of the strategic importance of it, and why it's so important to the customer, how it's going to impact our revenue stream, things like that, our reputation, then I should be able to take that information, devise an approach, a managerial approach and a leadership approach that inspires the people on the team to get this job done, and that we walk away in a truly, truly what we'll call world class type of organization, where you have not only delighted your customer, you have delighted your management, and you have delighted your employees, and even your contractors. And that ability to delight is far, far beyond just simply getting something done from start to finish.

**KL:** What can and should PMI be doing to help us out with this?

**FS:** One of the things that I think I'd like some more of, especially in PMI meetings, is to bring in the leaders of major companies, CEOs, especially those that see the value of project management, and then have some exposure to people that are running these large organizations, and listen to the executive point of view on what they see is the value of project management. What are their expectations? What are their obstacles and problems and issues that they see? And we get that first hand, so that the practicing project manager, who has his/her sights set on higher level positions in an organization, will know what to do to make that connection between what we call upper level management and the people that are in the field doing the work.

**KL (56:57):** I think that's a great idea, getting the CEO angle on project management and project managers so PMs can more clearly understand their expectations, and the larger strategic picture.

PMs really need to focus on the desired outcome rather than the originally planned outcome. They need to be able to adapt to the reality of the situation. Frank's book [Positive Leadership and Project Management: A Practical Guide to Enhancing Individual, Team and Organizational Performance](#), is available at amazon.com. You can reach Frank on LinkedIn.

So what are some of the common threads that come out of these discussions? Well, for one, projects serve a larger organizational strategy. As project manager, you must understand that dynamic and keep it in your sights at all times. Be prepared to shift as needed to keep your project in line with the organizational course. And, of course, culture counts. A lot. But we got something new from these guests. It's not just that project management drives value, but how PMs take agency in showing their own value that matters. You must brand yourself and your role. If you want to be effective, that is the framework in which you must communicate and perform.

Special thanks to my guests Thomas Galvin, Janet Burns and Franks Saladis.

**Announcer:** Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post-production performed at M Powered Strategies.

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## 74. Seizing Opportunity

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Tune in to next month's episode, where we take a PM Point of View® on two key culture-changing moments in history.

**Mike Hannan:** People really were trapped in dust and debris, couldn't get out. People who were emerging did look like zombies. We saw some people that were trapped in the towers themselves were jumping. That was what some people were starting to do into the water, too, to get off the island. And so if a sealift rescue hadn't happened quickly, there would have been unmitigated human disaster,

**Shaun Simms:** The whole African American community in Montgomery came together. And the communication to be able to reach out to 17,000 to 30- to 40-thousand individuals in a matter of three days in 1955 is unheard of.

**KL:** Visit our Facebook page, PM Point of View®, to comment and to listen to more episodes, and get the transcripts. Leave comments on the [projectmanagement.com](http://projectmanagement.com) portal (I like to read those), evaluate us on iTunes, and of course, you may contact me directly on LinkedIn. I'm your host Kendall Lott, and until next time, keep it in scope, seize opportunity, and get it done.

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