
**“Let practitioners speak” – An open invitation to the PM
community for the development of Annotated Project
Handbooks (APHs)¹**



<http://ipma.ch/education>

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Project Management is an applied discipline in much an analogous way to constructing a road, flying an airplane or performing a surgery. Applied disciplines require performing in real-world situations, not merely having knowledge about the subject matter. Performing, in turn, requires hands-on experience, possibly coaching, analysis of successes and failures and integration of lessons learned. This may be straightforward for some disciplines, such as medical doctors and airplane pilots, where many similar cases can be found and made available for study. Unfortunately, Project Management is not one of them. Projects are unique by definition, happen in different locations, represent a collective effort of different project teams and extend, usually, over a long period of time. Such features make embedding hands-on project management experience in training programs problematic.

In my view, this explains why most project management training programs are generally theoretical in nature or at least with a minimal practical dimension. Many courses spend too much time on teaching concepts and methods and too little on practicing in real-world projects. Likewise, there are many project management books that include exercises mainly confined to testing knowledge on theoretical issues, or on performing relatively simple numerical calculations. The value of existing E&T programs and literature cannot be diminished, however, it can be argued that practical advice is by enlarge incomplete and segmental in many current offerings.

This in turn makes a lot of successful project managers to be based on limited academic grounds and a lot of trainers and educators (*like myself*) to have an excellent theoretical background, much of which cannot and possibly will never be applied in practice. As such, Project Management seems to be somehow fragmented between theory and practice; the former is accomplished in Universities, Colleges and many books and the latter is practiced in the real world. Do real professionals benefit from the thoughts of all those books and research papers published every

¹ This article belongs to a series of articles edited by members of the IPMA Education and Training (E&T) Board on the subject of project management education, training, careers and related topics. More information about the IPMA E&T can be found at <http://ipma.ch/education>.

year on project management? Do educators, trainers and researchers benefit from practical insights? In my mind (*I may be wrong*), yes, but only in a small percentage. Ask professional project managers how many books or how many research papers they read or ask educators, trainers and researchers how much they base their courses on current practical experiences and you may corroborate this argument. And there may be good reasons for this such as lack of time, limited relevancy, perceived high value of the effort vs benefit ratio etc. The fact remains that we need a different approach to be able to educate and further develop project managers for real-life projects through Education & Training (E&T).

IPMA (International Project Management Association) has long been advocating competency based certification where theoretical knowledge is coupled with appropriate skills and attitudes gained through practical experience. Much of IPMA effort has been streamlined towards certification with limited effort devoted to E&T. As a matter of fact the two disciplines are kept separate and they are not related to one another. There is a sound theoretical and regulative basis for this.

What is important is that E&T is considered as an independent endeavor. This means that one may select between different courses and/or develop through self-study. The concept seems working, as more than 200,000 IPMA certificate holders may indicate. This, in fact does not mean that there may not be a more efficient approach. And a proposal of such an approach is the subject of the remainder of this paper.

The role of the Project Handbook in the IPMA certification process

IPMA certification at all levels other than the introductory one (level D) is based on the preparation by the Candidate and the assessment by the Assessors of a Project Handbook. The Project Handbook consists mainly of the description of a project and of the project performing company, of a collection of relevant project management plans (project assignment, environment analysis, organization chart, Work Breakdown Structure, resource plan and matrix of responsibilities etc.) and the presentation of a number of management challenges met during project implementation each of which is linked to at least one IPMA competence element. Each of the management challenges is presented using the STAR approach i.e. by the description of an actual project **S**ituation (what happened, when, where and why and who was involved), the corresponding definition of the required **T**asks to be accomplished and of the actual **A**ctivities undertaken (what, where, when and by whom) and, finally, of the presentation of the **R**esults achieved.

It follows that much practical project management experience can be found in such Project Handbooks. The know-how gained collectively through many years by IPMA Certification Bodies and Certification Assessors is invaluable. IPMA is therefore uniquely positioned to follow such a route with the possible contribution of IPMA certification holders, other practicing project managers, educators and trainers, publishers, content and software developers and many others who have an interest in the development of the area. Please keep in mind that at all time, the separation between Certification and E&T should be preserved.

What is an Annotated Project Handbook (APH)?

An Annotated Project Handbook (APH) is an enhancement of an edited Project Handbook so that it can be used for training. The editing of the Project Handbook concerns the masking of sensitive personal and company information as well as the provision of direct links to IPMA standards (e.g. competences) and the project management life-cycle. Enhancements, on the other hand concern the development of appropriate questions, activities and presentations (training slides) along with references to additional study materials such as standards, literature, software and multimedia. At the IPMA E&T Board we have already been experimenting with sponsoring books and cooperating with publishers² as well as using multimedia content as a training resource^{3,4}.

As APHs are expected to be developed by different people in different locations and with different project management capabilities APH development should be both regulated to be able to arrive at consistent outcomes and, at the same time, deregulated to cater for diversity (different mindsets and different needs).

Let us elaborate a little further on the above somewhat contradictory requirement. On the one hand, APH development should be based on a minimal theoretical background (i.e. a Basic PM Theory book), consistent terminology (i.e. a PM Glossary) and well-defined guidelines and specifications. Possible additions to this part may be train-the-trainer provisions, additional IPMA or Member Association published literature (such as the GPM's Field Book) and regulations relating to the use of the system. Collectively the above form the "foundation" part of the APH which is aimed at regulating APH development and use.

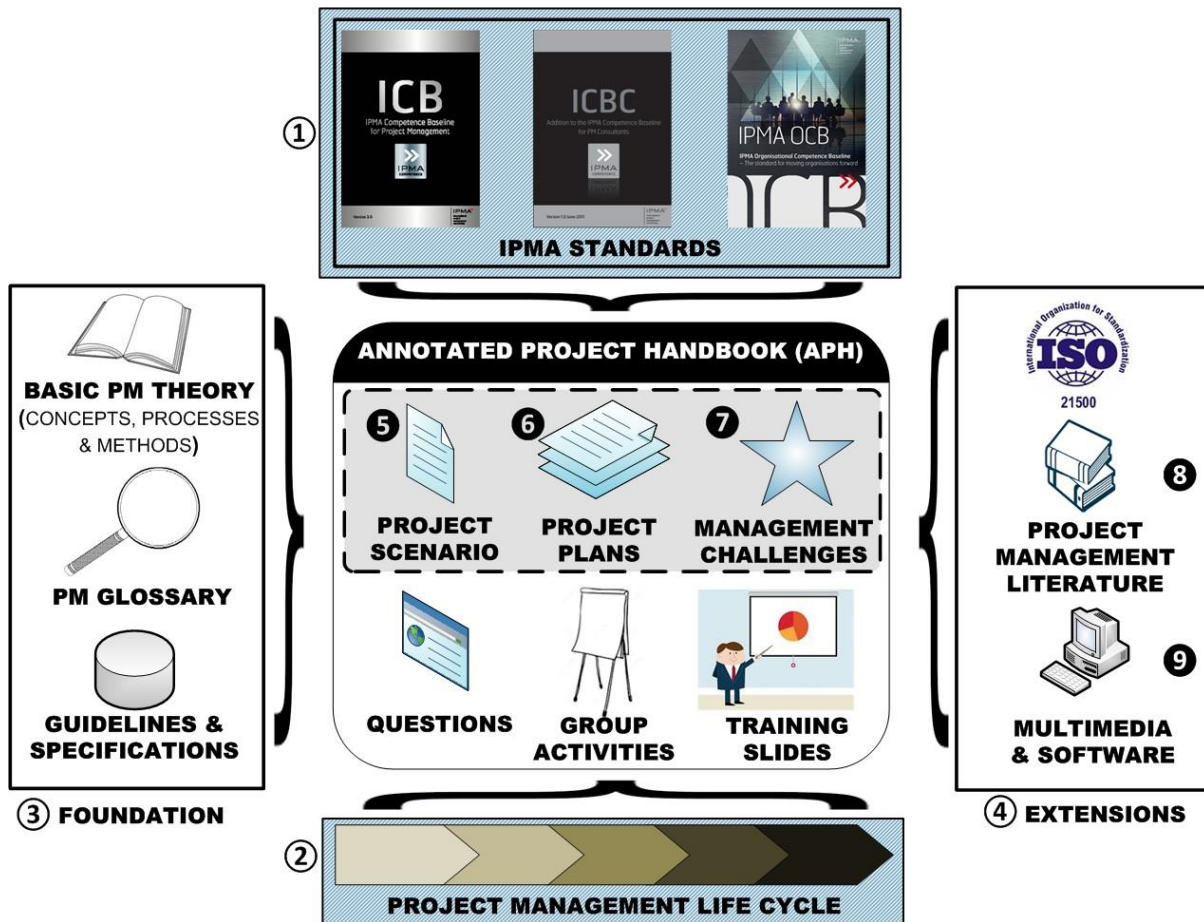
On the other hand, diversity should be accommodated by allowing different project management life cycles, methods and procedures to be used, by providing references to alternative literature (e.g. in different languages and/or from different authors) and by allowing the incorporation of different technologies (such as different knowledge bases, multimedia content, PM and educational software). Alternative literature may be extended to include alternative books on Basic PM Theory which may range from publications such as PM Austria's PM Baseline (available free on the internet) to IPMA E&T sponsored books. As a matter of fact, I think that only standards are hard constraints; anything else could (and should) have a smaller or greater degree of freedom or independence.

² See, the E&T recommended literature page at <http://ipma.ch/education/recommended-literature> .

³ See, for example, the best presentation of the E&T Stream at the 27th IPMA World Congress entitled "*The Project Manager as a Clown: Using clown techniques for future project leaders*" at <https://www.youtube.com/watch?v=HNffsZKvcOk>.

⁴ See, also, the video proceedings of selected papers at the 26th IPMA World Congress with synchronized presentation and slides developed in cooperation with PM Channel® at <http://video.ipma.gr> .

The general architecture of APH development can now be portrayed schematically: Practitioners' primary sought contribution is highlighted as items 5, 6 and 7, whereas publishers, software and multimedia providers as items 8 and 9.



IPMA Coordination & Primary Contribution

<p>① : Coding of APH is based on the IPMA Standards (e.g. ICB Competence Elements)</p>	<p>③ : Minimum prerequisites for the development of consistent APHs .</p>
<p>② : Coding of APH is based on the PM Life Cycle (Pre-Project phase, Project Assignment, Project Start, Project Coordination, Project Control, Management of Project Changes, Project Marketing, Project Closure, Post-Project Phase)</p>	<p>④ : APH Extensions to Standards, PM Literature (published books and papers) and multimedia content offered by suitable publishers/providers and/or sponsored by IPMA</p>

Practitioner's Primary Contribution

<p>⑤ : Project Scenario (History, rationale and description of the project and the performing organization)</p>	<p>⑥ : Project Plans referencing the appropriate point of the PM Life Cycle and the competences required to develop, maintain and operate. Such plans include the Project Objectives, WBS, Organization chart etc.</p>	<p>⑦ : A description of the PM challenges referencing the appropriate point of the PM Life Cycle and of the required competences . The description follows the STAR structure (Situation & challenges, Tasks, Activities, Results)</p>
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Publishers, Multimedia & Software Providers Primary Contribution

8 : Project Management Literature. Provision of links to e-books, knowledge bases, relevant reports and other materials.	9 : Multimedia & Software. Provision of multimedia (photos, diagrams, videos etc.) materials, and relevant software
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APHs, therefore, may become useful E&T resources while at the same time they will clearly demonstrate the benefits of competency based project management as that advocated by IPMA. Simply put, the whole IPMA approach may become more easily appreciated and more appealing to both novices and busy professionals alike.

The system may be enriched with IPMA taxonomy, in a similar fashion to that already used in the IPMA Registration Program⁵ to distinguish further between different capability levels.

Also, APHs can be of different size and complexity from simple demonstration projects to complex endeavors who have achieved project excellence. And finally, the training activities based on APHs may be of varying format, duration and difficulty ranging from short introductory courses for novices to more complex and lengthy ones for seasoned project managers.

Sounds interesting? You are invited to contribute!

I am sure that the approach may sound familiar to some and there are people out there who have worked along similar lines. This is however a first opportunity to coordinate, cooperate and offer an E&T system to a wider audience under the auspices of IPMA.

As such, if you find the idea interesting, or worth investigating further, please do not hesitate to contact the IPMA E&T Board. We will be very much interested in establishing or furthering existing contacts to professionals, publishers, multimedia providers, trainers, training organizations and software houses who would like to contribute, comment or, simply, criticize. No organization or individual is too large or too small not to be considered and, if successful, gain through their contribution at least visibility to a wide audience across six continents. Selection of partners to work further on this will be based on the merit of the thoughts and proposals submitted and not on the size or name of the proposer.

Of course this is a first presentation of ideas and I agree that perhaps further work on concepts, procedures and the operation of the system may be needed. But what is your first reaction, comment or proposal? I would really like to hear from you! Please feel free to drop me a line at jpp@central.ntua.gr at any time!

⁵ See, also the IPMA Registration page at <http://ipma.ch/education/ipma-registration> .

About the Author



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John-Paris Pantouvakis, M.Eng., M.Sc., PhD, C.Eng; following a ten year career in industry moved to Academia and is now a Full Professor and the Director of the Centre for Construction Innovation at the National Technical University of Athens (NTUA). John-Paris is also an Adjunct Lecturer and a Postgraduate Module Coordinator at the Hellenic Open University. Currently (2015-17) he chairs the IPMA E&T Board and he is the President of PM-Greece, the Greek IPMA Member. John-Paris is also a First Assessor for IPMA Certification in Greece and an IPMA Project Excellence Awards Assessor. He has chaired the 26th IPMA World Congress in Greece. More information is available at his personal website (http://users.ntua.gr/jpp/jpp_en.htm).