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Managing Complex Projects and Programs
Author: Richard J. Heaslip, PhD
Book Review   Reviewer: Eldon J. Zorinsky

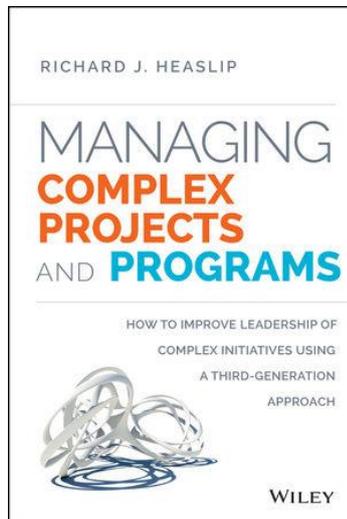# PM WORLD BOOK REVIEW

Book Title: ***Managing Complex Projects and Programs – How to Improve Leadership of Complex Initiatives Using a Third-Generation Approach***

Author: **Richard J. Heaslip, Ph.D**

Publisher: John Wiley & Sons, Inc., Hoboken, New Jersey

List Price: $85.00   Format: Hard cover; 283 pages

Publication Date: September, 2014

ISBN: 978-1-118-38301-8

Reviewer: Eldon J. Zorinsky, PMP

Review Date: March 2015

Introduction to the Book

In his new book, "*Managing Complex Projects and Programs – How to Improve Leadership of Complex Initiatives Using a Third-Generation Approach,*" Richard J. Healslip, Ph.D examines the (underappreciated) "identity crisis" expressed by many project and program managers; he uncovers its root causes and explores its adverse impacts on organizational performance, the profession and individual project and program leaders. He begins this process by asking the question: "What circumstances have led experienced, successful project and program leaders to become exasperated with their profession (those who the author defines as "Exasperados" – project and program managers who yearn to deliver not only traditional project "outputs," within the constraints of schedule, scope, cost and quality, but organizationally-desired "outcomes" as well)?"

The intellectual journey he takes the reader on clearly leads to the answer to his question. In workman-like fashion, Dr. Heaslip uses his concepts of "programmatic science" to lay the foundation upon which he formulates the idea of "3rd generation programmatics" as a means to achieve the next generation of organizational capabilities.

By employing his own broad experience along with organizational case studies and a great deal of anecdotal information obtained via personal interviews with a broad spectrum of academics, industry executives, sponsors, stakeholders, program and project managers, team members and others he is able to systematically analyze and evaluate the approaches used to date, along with their associated results, to develop a sound alternative that will enable many organizations to rise to a new level of program and project management maturity that has the potential to dramatically improve execution, drive higher levels of strategic achievement and result in greater career satisfaction and professional growth opportunities for project and program managers ("Programmaticists").

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Dr. Heaslip does an outstanding job of methodically reviewing the evolution of Industrial Age organizational structures along with the project and program management methodologies that developed from them, and in so doing, he establishes a solid baseline understanding from which he can construct a new organizational framework that drives greater clarity with regard to the roles and responsibilities of project and program managers, as well as governance bodies and, by its structure, demonstrates how they should optimally interact in a large, modern organization that is characterized by the growing challenges associated with diverse groups of stakeholders attempting to carry out an increasing number of disparate activities under a wide variety of constraints in a multi-dimensional environment of complexity and uncertainty both internal and external to the organization.

Overview of Book's Structure

The book consists of 14 Chapters, organized into two parts. The first part of the book consists of Chapters 1 through 8 and focuses on "Professional Project and Program Management – Yesterday and Today." Topics covered include: the exhilaration and exasperation of Project and Program leadership; the emergence of project management (what the author calls "1st Generation Programmatics"); the evolution of project management ("2nd Generation Programmatics"); rethinking roles and responsibilities of project management professionals; Stakeholder views about the roles and responsibilities of "Programmaticists" (e.g., project and program management professionals); addressing modern problems with traditional management models; adaptations of the traditional two-party fully governed project oversight model; and what to do moving forward.

In the Second part of the book – Chapters 9 through 14 - the author discusses "The Promise and Practice of Third-Generation Programmatics. Topics covered include: leading complex endeavors; a new perspective on programs and program management; the introduction to "3rd Generation Programmatics;" a discussion regarding the decision to implement 3rd generation programmatics; suggestions on developing programmatic leadership competencies; and finally, a discussion on beginning a 3rd generation programmatics organization.

Highlights: What's New in this Book

The author compiles a significant number of real-world organizational case studies and anecdotal data and then analyzes and evaluates this information vis-à-vis an historical view of the evolution of project and program management methodologies, definitions, tools and techniques that were used. The results of his methodical approach enables the reader to embark on a journey of intellectual discovery that provides incredible insights into many of the issues facing today's project and program management professionals, as well as their management teams and sponsors. The author's overall approach to helping readers understand and appreciate these issues from the perspectives of other stakeholders is superb.

Dr. Heaslip leads the reader in step-by-step fashion directly to the logical conclusion of his in-depth evaluations - the concept of "3rd generation programmatics." He

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accomplishes this task by creating frameworks that facilitate the deconstruction and analyses of what had been done previously so as to gain an intimate understanding of what worked (or did not) and, more importantly, why.

By starting from the fact that organizational "Exasperados" exist and then carefully eliciting the reasons why within the context of "programmatic science," the author is able ascertain root causes and suggest solutions that could lead not only to more optimal organizational capabilities and performance levels, but also to more motivated and satisfied project and program management professionals.

In short, Dr. Heaslip has succeeded in putting down on paper what many project and program leaders intuitively realize is needed with regard to enhancing their levels of professional satisfaction, as well as improving the organizational environments in which they live, but would find difficult to express in ways that others outside of the PM profession would readily understand or relate to, much less affirmatively act upon.

Highlights: What I liked!

As a seasoned veteran who has had numerous opportunities over the course of many years to lead projects and programs of varying sizes and complexities, I can personally attest to the fact that these opportunities provided both the "thrills of victory" and the (thankfully rare) agony of having to explain why things appeared to be circling the drain. I have witnessed the evolution of project and program management in both large and small organizations and across several industries.

Success within the given set of constraints was always expected in spite of ever-present countervailing forces. Carrying out "lessons learned" on what didn't work and why provided useful and specific insights, but in general, the solutions that resulted were incremental in nature and not typically focused on driving broad (revolutionary) changes to how organizations, programs, and projects (or the roles and responsibilities of project and program managers and others) could be more effectively defined, structured, governed and managed in an environment of increasing complexity and uncertainty.

As the author points out, his extensive work reveals that "organizations that have not carefully and knowledgeably defined their *systems* for managing the pursuit of their goals through programs and projects and have too often sought to improve their capabilities reactively, through successive rounds of well-intentioned, but poorly executed organizational restructuring in which old problems are often exchanged for new ones."

By employing a thoughtful, analytical, step-by-step approach, Dr. Heaslip examines what has worked and what hasn't worked in the context of "programmatic science" wherein he evaluates project and program management systems within a framework that considers five principle types of uncertainty and complexity that include: organizational, environmental, stakeholder, operational, and outcome. This framework leads to several implications: "organizational success depends upon the organization's ability to manage all five types of uncertainty and complexity; for

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Programmaticists (project and program management practitioners) to be successful, they need to clearly understand their respective responsibilities for managing each type of uncertainty and complexity; for projects and programs to be successful in delivering their intended value, they should be designed to minimize complexity wherever possible, but they must be ready to solve complexity of every type when it arises."

The author further demonstrates that his framework enables four important activities – assessment, assignment, alignment and advancement (the so-called "4 A's") that ultimately lead to: more complete (extended) definitions of projects and programs that highlight the *differences* between them as well as the *benefits* of doing so; increased clarity with respect to the various types of Programmaticists that are needed (the Traditionalist, the Operationalist and the Inclusivist); the knowledge, skills and capabilities required to deal with these more broadly defined roles and responsibilities, along with their respective autonomy and authority; and finally, much-needed insight into how organizations, projects and programs can be more efficiently and effectively structured, governed and managed using 3rd generation programmatics and its related three-party oversight system.

The author spends considerable effort explaining to the reader that the decision to move from more traditional and established methodologies to next generation approaches should be *carefully considered* – successful implementation strongly depends upon the organization's maturity level with regard to the "programmatic sciences." By this, the author means that "the organization's stakeholders understand the differences between "*outcomes*" and "*outputs*," *programs* and *projects*, and *program* and *project management*. It necessitates that they become familiar with the five kinds of uncertainty and complexity that are faced by programs and projects, and that they come to recognize the specific roles of governance committee members, program managers, project managers in managing each . . . and that they must *collectively* and *collaboratively* contribute to the management and leadership of programmatic endeavors." Once a decision has been made to move to the next level, the author explains what leadership styles and capabilities are needed for successful implementation of 3rd generation methodologies, as well as ways to develop those programmatic leadership competencies.

As a final suggestion, Dr. Heaslip proposes 12 questions that should be answered when assessing the potential value of employing a 3rd generation programmatic oversight system in any given organization. Answering these questions will help that organization understand "what complexity management skills will be needed for managing programmatic issues, as well as what degree of organizational readiness must be maintained for solving complex issues. The Organization then needs to ensure that it can staff the system appropriately (e.g., how best to fill their programmaticist positions, and, in particular, their program manager positions, with individuals who can be effective in their respective roles).

Everyone in the organization who is responsible for the performance of a third generation programmatic oversight system must be capable and prepared to contribute appropriately to its success." Depending upon the organization and its goals and objectives, the answers to these questions may demonstrate clear

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benefits for adoption; alternatively, they may reveal that existing 2nd generation approaches are satisfactory.

Who might benefit from the Book

This important book is a "must read" for anyone who wants to improve their understanding of organizations and the systems they employ to manage complexity and uncertainty in ways that deliver both traditional *outputs*, as well as strategic *outcomes* that provide value-adding benefits to the organization.

Dr. Heaslip's work is also a "must read" for every exasperated project or program manager who desires to better understand the reasons why they are experiencing career-related frustrations or "identity crises" that come about as a result of under-utilization or under appreciation, bureaucratic gridlock, or the lack of clear and appropriately-defined authority or roles and responsibilities and what should be done to directly address these issues in order to improve career satisfaction as well as the organizational environment.

The book is also a "must read" for stakeholders, executives, sponsors or others who interact directly or indirectly with these "Exasperados."

Conclusion

"***Managing Complex Projects and Programs – How to Improve Leadership of Complex Initiatives Using a Third-Generation Approach***," by Richard J. Healslip, Ph.D. sets an important benchmark for works dealing with "programmatic science." The author clearly and concisely reviews the evolution of organizations and the systems they have employed to manage uncertainty and complexity from the diverse perspectives of their environments, organizations, stakeholders, operations, and outcomes.

The "Five Complexities" framework is used to refine and improve the definitions of a Programmaticist's roles and responsibilities by enabling four critical activities - assessment, assignment, alignment and advancement - that facilitate an understanding the of the knowledge, skills and capabilities necessary to address each type of complexity and uncertainty. The resulting analyses, in turn, provide the reader with the necessary perspective and tools to better comprehend why certain approaches worked (or not), as well as the insights required to adjust the organizational machinery in ways that can improve its efficiency and effectiveness while concurrently growing the capabilities of their project and program teams and governance bodies.

 As organizations with diverse groups of stakeholders take on ever-larger numbers of increasingly complex and uncertain tasks, it is becoming more evident that the Information Age will necessitate different structures, techniques, and tools to facilitate more effective and efficient project and program delivery systems.

These conditions also mandate recognition and acceptance of the broader roles and responsibilities that Programmaticists must assume in modern organizations to

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www.pmworldjournal.net

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insure success at program and project levels as well as the depth and breadth of knowledge, skill, capability and experience needed to not only to realize that success, but to enable them to continue to grow personally and professionally in order to optimize their performance as well as those of their modern teams in ways that deliver traditional *outputs* along with strategic *outcomes* with benefits that add value.

Managing Complex Projects and Programs – How to Improve Leadership of Complex Initiatives Using A Third-Generation Approach, by Richard J. Heaslip, Ph.D, published by John Wiley & Sons; September, 2014, ISBN 978-1-118-38301-8; $85.00 USD; 283 pages, hard cover. More at http://www.wiley.com/WileyCDA/

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Dr. Eldon Zorinsky is an experienced technology executive, Program Director, certified Project Management Professional (PMP) and registered Professional Engineer in the State of Texas. Eldon specializes in building high-performing teams of technical and business professionals and leading them in the definition, development and commercialization of new products and technologies.

He received his Doctor of Engineering degree in Electrical Engineering and Master of Science degree in Engineering Management from Southern Methodist University in Dallas, Texas. He also earned a Master of Science degree in Physics from the University of Missouri at Columbia, MO and a Bachelor of Science degree from Creighton University in Omaha, NE. He holds numerous patents in the areas of semiconductor devices and device isolation and over the course of his career, has successfully led product and technology development and commercialization efforts that generated combined revenue of nearly $1B.

Eldon is an active member of the Dallas Chapter of PMI and is currently serving as a volunteer with the Chapter's Professional Development Group. He is also a member of IEEE, The Engineering Management Society, AAAS, and The American Vacuum Society. Email: ejzorinsky@gmail.com