

## Series on organisational strategic planning & execution<sup>1</sup>

### Stage 5: Achieve strategic outcomes and realise benefits<sup>2</sup>

By Alan Stretton

#### INTRODUCTION

In this series of five articles I have been using the basic strategic business framework shown in Figure 1 below to discuss some particular issues within the organisational strategic planning, execution and benefits realisation processes which do not appear to have been adequately addressed in the PM literature.

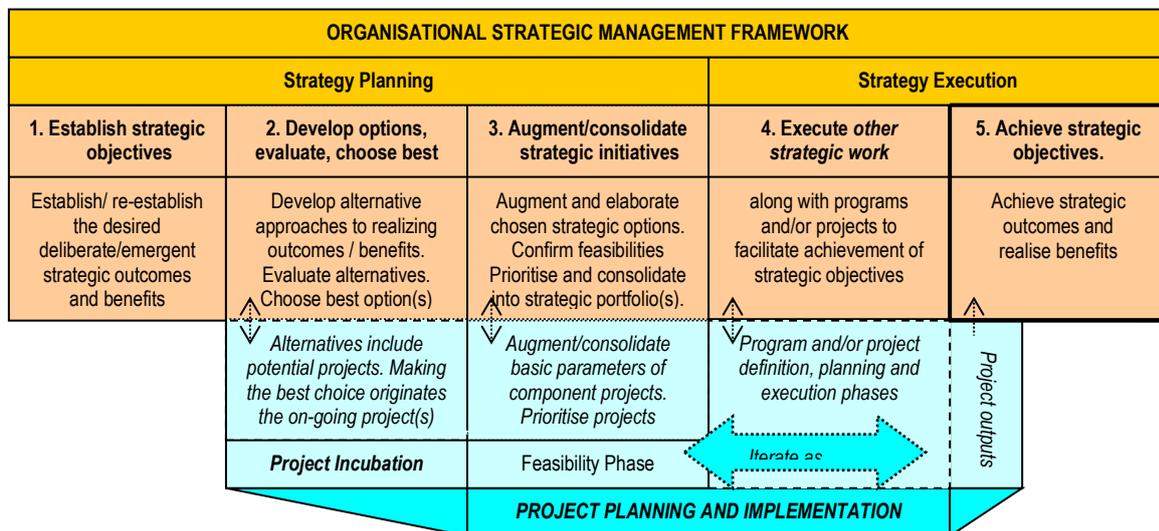


Figure 1: An organisational strategic management framework, with project contributions

The first article in this series (Stretton 2018d) addressed *Stage 1: Establish strategic objectives*, and discussed the extensive preliminary work needed before strategic objectives can be reasonably established, the importance of “emergent” strategies, and the need to re-establish strategic objectives as the latter come into play.

The second article (Stretton 2018e) addressed *Stage 2: Develop options, evaluate, and choose the best*. It focused on the importance of developing alternative strategic initiatives, and of achieving reliable conceptual level estimates to facilitate valid evaluation of the options.

<sup>1</sup> This is article five in a five-part series on strategic planning by Alan Stretton, one of the world’s experts in program and project management. This series is based on Alan’s research and writing on this topic over the last several years, much of which has been published in previous editions of the *PM World Journal*.

<sup>2</sup> How to cite this paper: Stretton, A. (2018). Stage 5: Achieve strategic outcomes and realise benefits, Series on Organizational Strategic Planning and Execution, *PM World Journal*, Volume VII, Issue VIII – August.

The third article (Stretton 2018f) addressed *Stage 3: Augment and consolidate strategic initiatives*, which included augmenting and elaborating the business cases for the chosen initiatives, confirming feasibilities, and prioritising, balancing and consolidating the strategic initiatives into a strategic portfolio, or portfolios.

The fourth article (Stretton 2018g) was concerned with *Stage 4: Execute “other strategic work” along with projects*, and focused on the former, hopefully partially redressing the imbalance with project/program execution which so dominates the literature.

This fifth and final article will be concerned with *Stage 5, Achieve strategic outcomes and realise benefits*, focusing mainly on some strategic benefits management and realisation issues which do not appear to have been altogether convincingly covered in the project management literature.

## **BENEFITS AND ORGANISATIONAL STRATEGY**

I have not seen much material in the relevant general management literature that uses the terminologies *outcomes* and/or *benefits* to any extent in the strategic context. Yet these terminologies are used quite widely in the project management literature – particularly *benefits*, as we will see shortly.

### **Linking benefits and strategy**

As Pells 2017 pointed out recently, organisational strategies evolve, both directly and indirectly, from the organisation’s desired outcomes and the benefits it aims to achieve. Strategies evolve directly when deliberately formulated in top-down mode to achieve specifically planned benefits. They evolve more indirectly when they come in an emergent way, for example as internal bottom-up proposals, or as responses to emerging external threats or opportunities.

I discussed deliberate and emergent strategies in some detail in Stretton 2017k, and pointed out that strategic initiatives which are generated in an emergent context sooner or later become an integral part of an organisation’s strategic initiatives. I have made specific provision for both types of strategies in Figure 1, in the first stage – *1. Establish strategic objectives* – by describing the process as “Establish and elaborate desired deliberate and/or emergent strategic business outcomes and benefits”.

In this way, benefits are directly linked with strategy, and thence the strategic planning and execution processes. Figure 1 then represents these strategic management processes, and summarises the path from establishing desired organisational strategic benefits to realising them.

However, there are substantial materials in the project management literature that show processes for benefits management that do not highlight this direct connection with organisational strategy. We now look at examples from two standards.

**Benefits management in two project/program management standards**

The following focuses on two standards which describe benefits management processes in some detail. These are

- *PMI 2017: The Standard for Program Management*. Chapter 4 is specifically concerned with what it describes as Program Benefits Management.
- *APM 2012: APM Body of Knowledge*. Benefits Management is a specific topic under the broader heading of 3.2 Scope Management.

We first look at summaries of the benefits management processes proposed by each.

• **PMI 2017: 4. Program Benefits Management**

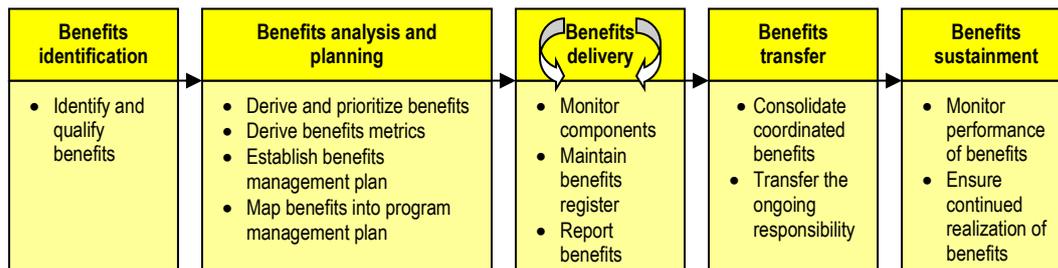


Figure 2: Derived from PMI 2017, Figure 4-1. Program life cycle and program benefits management

• **APM 2012: 3.2.1 Benefits Management**

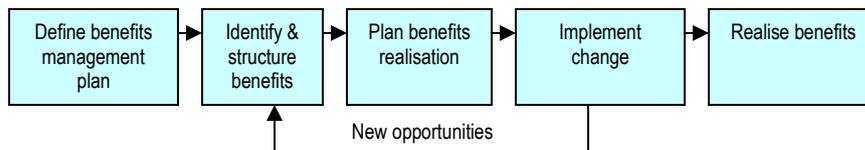


Figure 3: Derived from APM 2012: Figure 3.7 Benefits management process

I have broadly aligned these benefits management processes vertically, and it can be seen that they are quite similar. Variations in the realisation processes possibly reflect different contexts in which they are seen to be applied.

Now, the first thing to be noted is that neither diagram depicts any links between benefits and organisational strategies. The best that can be said is that any such links are only indirectly inferred. For example, PMI 2017 is specifically concerned with programs, and links them with strategy as follows (in section 1.5):

Organizations pursue program management to pursue complex initiatives that support organizational strategy.

So, the connection between benefits and strategy is rather indirect, via programs, which are seen as the key link-point.

A similar comment can be made about the APM approach, which includes projects and portfolios, as well as programs, in this key link-point role – e.g. in APM 2012:46:

The third stage of strategic management is implementation through projects, programmes and portfolios. The relationship between strategic management and P3 should be close and symbiotic.

I believe that the contributions to the achievement of strategic benefits depicted in Figures 2 and 3 would be clearer if they were presented in the broader context of their links to strategic planning and execution, perhaps along the lines of what I have been trying to achieve in Figure 1.

Whilst it is reasonable to expect that a program management standard such as PMI 2017 would be somewhat preoccupied with programs, and sometimes (as with Figure 2) fail to depict them in a broader context of their relationship with strategic objectives, there is an associated problem I have with Figure 2, and PMI's chapter on benefits management, as now discussed.

## **PROGRAM BENEFITS MANAGEMENT?**

It is first noted that PMI 2017 focuses on programs in its chapter on benefits management, which indeed is entitled *4. Program Benefits Management*. Hudson 2017 has a similar focus in an article in this journal entitled *Managing Programme Benefits*, as do Abba et al 2018, also in this journal. These could be seen as implying that only programs are involved in realising strategic benefits. This, of course, is not so.

Now, in earlier chapters, PMI 2017 does discuss the roles of component projects, and of portfolios, but this is not directly reflected in its Chapter 4, nor in Figure 2 above, which derives from that chapter. So the implication that only programs are involved would still appear to apply if you only read Chapter 4. But there are two other reasons why this implication is not valid, as now briefly discussed.

## **Standalone projects have been excluded**

The first (and relatively trivial) reason is that standalone projects can be in a similar position to programs in this context. As Morris 2013:190 points out, benefits management also applies in the project context. Indeed, an article by Lindenburg et al 2004 was quite specifically entitled *Managing Project Benefits*. As far as I can see, PMI 2017 does not cater for standalone projects.

## **Non-project “other strategic work” is not adequately covered**

A second, and more important, count, is the fact that non-program/project inputs are nearly always also required. Indeed, these can often be more important than the inputs from programs/projects. However, as I discussed in Stretton 2018g, the management of non-project work is not adequately covered in that part of the program management literature which deals with benefits management. PMI 2017 briefly discusses *other program-related activities*, but does not cover as broad a scope as my *other strategic work* category discussed in that article.

This suggests to me that Figure 2, from PMI’s Chapter 4, would be more representative if it made provision for other strategic work, as I have attempted to do in my Figure 1, for example.

## **MULTIPLE STRATEGIC INITIATIVES AND STRATEGIC PORTFOLIOS**

### **Benefits very often come from multiple strategic initiatives**

Another factor relevant to benefits realisation is that multiple strategic initiatives are very often involved. As Hudson 2017 comments,

While benefits may relate to a single programme, benefits typically depend on the contributions from multiple initiatives, internal actions and change programmes.

Figure 2 above, from PMI 2017, is concerned with the contribution of an individual program to benefits. As such, it does not cover considerations of how contributions from other programs are also assembled and amalgamated. Nor does it cover non-program/project other strategic work associated with the programs.

### **Roles for strategic portfolio management**

There appears to be some measure of agreement in the project management literature that the above work of amalgamating programs is normally undertaken by portfolio management. Therefore, strategic portfolio management becomes very important in the multi-strategic-initiative context.

It would also appear that portfolio management is in the best position to ensure that non-project/ program *other strategic work* that is associated with the programs (e.g. Hudson's *internal actions and change programmes*) is properly managed, and amalgamated with the project/program work.

## **MANAGEMENT OF BENEFITS REALISATION**

### **Who actually manages the realisation of benefits?**

Another concern deriving from Figure 2 in particular is that it could be seen as implying that the program manager will have actual direct control of the realisation of benefits. In most cases this will be unlikely, on a number of counts, many of which have to do with the huge variety of types of benefits, and in their areas of application. For example, let us look at the following quotation from PMI 2017, in its introductory section in *Ch 4. Program Benefits Management*.

Various types of benefits may be defined and generated by programs. Some benefits, such as expanded market presence, improved financial performance, or operational efficiencies, may be realized by the sponsoring organization while other program outcomes may be realized as benefits by the organization's customers or the program's intended beneficiaries.

The question of responsibilities for ensuring that the strategic business outcomes are achieved, and that the benefits are realised, is a very substantial one. It is also quite a complicated one, because of great variations in the organisations involved, their set-up(s), and how they relate with the provider of strategic outputs and/or outcomes. It appears to me that the responsibility for outputs, and in many cases outcomes, would normally be with the strategic portfolio manager.

However, in the immediately preceding article in this series, we introduced O'Donovan's (2018) function of change management. This is seen as being a separate discipline in its own right, and O'Donovan discusses it in the context of a partnership between project management and change management.

In this series we have been considering projects in the broader context of being part of a strategic portfolio, along with *other strategic work*. In this context, the type of 'partnership' suggested by O'Donovan might then be between change manager(s) who are concerned with *other strategic work*, and strategic portfolio manager(s) who would then be primarily concerned with their component programs and/or projects.

Whether or not there is a change management function (in this or a different form), in addition to strategic portfolio management, it appears to me that they are primarily concerned with achieving the planned strategic objectives. However, it is far from clear how either, or both, would contribute in any substantial detail to the actual realisation of benefits, particularly in view of the following.

## **Benefits may not be realised until long after the delivery of strategic outcomes**

Dalcher 2017 has pointed out that,

Benefits stream flows and evolves over time as people learn to use it.

In these circumstances, the management of benefits realisation becomes very much an operational responsibility. There is also a time-related element in the somewhat more complex situation described in OGC 2007:181 as follows.

Realising the benefits incorporates the planning and management of the transition from old to new ways of working and the achievement of the outcomes, whilst ensuring that the operational stability and performance of the operations are maintained.

Again, responsibility for benefits realisation in these types of transitional situations appears to be predominately with operational managers. As Hudson 2017 puts it,

Benefits realization is the responsibility of the programme's benefit owners not the programme.

In any event, it seems to me that a benefits specialist will often be needed to help in some aspects of benefits realisation, so let us look at what has been said about this in the project management literature.

### **Appointing a specialist Benefits Manager?**

In the context of a project portfolio management model for executing organisational strategies in a South African State Owned Enterprise (SOE), Smit 2017 has cited a need for having a specialist to ensure consistency across a wide range of benefits realisation processes by nominating a portfolio benefits manager, as follows.

*Portfolio benefits manager:* Person responsible for ensuring that a consistent approach to benefits management is applied across the portfolio.

Morris 2013:84 has a somewhat different take on the role of a Benefits Manager in the following discussion on Benefits Management.

'Benefits Management' also became an area of strong interest in the early 2000s, at least in the IT/systems area. Arising out of the development of program(me) management in the mid-1990s..., benefits are defined as "the measurable improvement resulting from an outcome". ....

Benefits Management involves identifying a 'Benefits Manager' who is responsible for measuring the benefits delivered (or 'harvested') and feeding them back into the program for incorporation in future 'project tranches'

Hudson 2016:437-8 has a somewhat different take on a Benefits Manager, whom he describes as follows.

Benefits managers are responsible for facilitating and managing benefits within a programme across one or more organisational areas. They will be aligned with (or report to) one or more organisational areas but may also report to the programme manager, central strategy or change office.

Hudson goes on to describe a *benefits management practice leader*.

The benefits management practice leader is responsible for defining, agreeing, deploying and overseeing benefits management practices and governance within a programme or across the organisation. ....

This position involves supervising the team that provides benefits management support services ....

The latter part of this quotation links quite strongly with Stewart 2016:202, who discusses the work of a *dedicated benefits management team* in the context of strategic program management initiatives in the Scottish police.

These discussions indicate that a specifically appointed Benefits Manager, or a Benefits Management team, have been seen as appropriate in a wide variety of situations. Therefore, it seems reasonable to suggest that either of the above, or in some cases both, would appear to be a very effective way of ensuring that strategic benefits can be fully realised in many different circumstances.

## **BENEFITS FOR MULTIPLE STAKEHOLDERS**

*Programs are conducted primarily to deliver benefits to the sponsor organizations or constituents of the sponsoring organization.*  
(PMI 2017:1.2)

So far we have been concerned with achieving strategic outcomes, and ensuing organisational benefits, in rather a generalised context. However, in most situations there will be multiple stakeholders and stakeholder groups, both internal and external, with many different perceptions of what constitute benefits for them.

### **Multiple stakeholders can be very numerous indeed**

In an earlier article in this journal on identifying and classifying program/ project stakeholders (Stretton 2014a) I identified fifty-five different potential stakeholders. About half of these were directly associated with the program/project supply chain (e.g. providers, investors, purchasers), whilst the other half (who could collectively be called “influencers”), were external to the supply chain.

This is a huge number of potential stakeholders. Those in the supply chain generally have a positive interest in the strategic outcomes, with a variety of expectations about benefits. External influencers will often include potentially adversarial stakeholders, whose potential to disrupt the strategic work needs to be catered for.

The *Benefits Manager* (or equivalent) will need to reconcile these and try to maximise benefits for all these internal stakeholders.

### **Benefits management and stakeholder engagement can strongly overlap**

Benefits management at this much more detailed level thus overlaps heavily with stakeholder management/ engagement. Detailed coverage at this level of detail is beyond the scope of this series. However, I will try to summarise a few key points, based largely on a series of articles in this journal by Lynda Bourne in 2015. I start with a quotation from Bourne 2015c.

Your project is being done by one group of stakeholders for the benefit of another group of stakeholders.

My first comment is that I have not seen any substantial materials which specifically address benefits to multiple stakeholders in any depth. However, there are some materials in the project literature on stakeholder management/ engagement which go close to doing that, and which appear to provide good guidelines for going the extra mile in focusing specifically on the benefits component of engagement with multiple stakeholders. We start with the need to identify and prioritise all stakeholders.

### **Identifying and prioritising stakeholders**

*The processes of stakeholder identification and management are, however, extremely complex, ...*  
(Pirozzi 2017)

In the project context, both Pirozzi 2017 and Bourne 2015e identify stakeholders as people, groups and organisations that can affect, be affected by, or perceive themselves to be affected by, any aspect of the project.

Bourne 2015e covers identification and prioritisation of stakeholders in very substantial detail. Her ESEI approach to assessing the relative importance of stakeholders considers three primary factors, the third of which has two separate components, as follows.

- **Power** – to influence the project (4 levels from low to high)
- **Proximity** – closely associated or relatively remote from the project (4 levels)
- **Urgency** – two separate components
  - **The vested stake** the stakeholder has in the work (5 levels)
  - **The importance** of the work to the stakeholder (5 levels)

The types of stakeholders who could be identified at the various levels within these categories is illustrated in the following stakeholders exemplified by Bourne in relation to the four levels of the *proximity* function (my abbreviations):

- **Proximity**

- L1: Relatively remote from the work; no direct involvement* – e.g. shareholders
- L2: Detached from the work, but regular contact or input* – e.g. clients; senior managers
- L3: Routinely involved in work* – e.g. part-time project team members; external suppliers
- L4: Directly involved in the work* – e.g. full-time team members; contractors

From the combination of the above four factors, Bourne says that an *Index value* can be calculated for each stakeholder. She goes on to say,

The next step is visualising this data, to understand who is important at this point in time so that informed decisions can be made about where to direct the limited resources available to achieve the most beneficial outcomes for both the stakeholders and the work itself.

### ***Understanding and visualisation – the Stakeholder Circle***

Bourne 2015f discusses the Stakeholder Circle, which she introduces thus:

The **Stakeholder Circle** methodology uses this data [from identification and prioritisation] to create its primary visualisation tool – the *stakeholder circle*.

I will not attempt to reproduce Bourne's *stakeholder circle* here, but strongly endorse her claim that,

The *Stakeholder Circle* is an information rich diagram. The basic structure is created from the assessment of power, proximity and urgency used in the prioritisation process.

### ***Attitude and engagement – tracking changes over time***

Bourne 2015g also indicates that

The Stakeholder Circle has been designed to facilitate the routine assessment of a project's stakeholder community and to allow changes to be tracked over time.

In the above I have tried to summarise Bourne's approach in a way which might hopefully help Benefits Managers collaborate with stakeholder management in achieving what Bourne 2015a has described as "success based on mutually beneficial stakeholder engagement".

This concludes my discussions on Stage 5, which is the last of the organisational strategic management stages covered in this series. This rather eclectic series of discussions is now summarised.

## SUMMARY OF THIS ARTICLE

This article has focused on the following strategic benefits management and realisation issues that do not seem to have been so well covered in the literature.

### **Benefits and organisational strategy**

- Benefits are strongly linked to organisational strategic management. In particular, the desired benefits are defined in planned strategic objectives.
- This linkage does not appear in the benefits management process diagrams of either PMI 2017 or APM 2012.
- These diagrams would probably be more insightful if such links were shown.

### **Program Benefits Management?**

- The title *Program Benefits Management* (PMI 2017:Ch4; Hudson 2017) is misleading. It could be seen to infer that benefits management is only about programs, which is not the case. For example, standalone projects are sometimes involved. More importantly, *other strategic work*, which is sometimes quite extensive, is nearly always required, over and above programs/projects, to help realise benefits.
- The *Program benefits management* process diagram (PMI 2017) also tends to reinforce a programs-only inference. It would probably be improved by providing for the above, particularly *other strategic work*.

### **Multiple strategic initiatives and strategic portfolios**

- Benefits very often come from multiple strategic initiatives, which together comprise a strategic portfolio. In these circumstances strategic portfolio management becomes an important component of benefits management.
- Portfolio management becomes an important component of benefits management.
- Strategic portfolio management is also a natural vehicle for ensuring that *other strategic work* is properly managed, and coordinated with program/project work.
- The benefits management diagrams could well be extended to include links to portfolio management, as well as to *other strategic work*, as mentioned above,

### **Management of benefits realisation**

- PMI's benefits management diagram could imply that the program manager actively manages benefits realisation processes. For a variety of reasons this would seldom happen, including particularly the fact that benefits may not be realised until long after the programs have been completed.
- Several writers have advocated the appointment of a *Benefits Manager*, with appropriate support, to ensure that strategic benefits are fully realised, particularly in the longer term. This, indeed, would appear to be an effective approach to managing benefits realisation.

## **Benefits for multiple stakeholders**

- Multiple stakeholders can be very numerous indeed, and typically will have a wide variety of differing perceptions of what constitute benefits for them.
- Benefits management for multiple stakeholders overlaps strongly with stakeholder management/ engagement.
- Techniques such as those of Bourne 2015 for stakeholder identification and prioritisation, understanding and visualisation, and attitude and engagement, would appear to be particularly appropriate to help Benefits Managers clarify and deliver benefits to multiple stakeholders.

## **SUMMARY OF SERIES**

The subjects of this series have been the five stages of organisational strategic planning and execution shown in Figure 1 in each article, which is based on some of my earlier articles in this journal. I have retained the lower sections which show how projects (and programs) relate to the basic strategic management stages, mainly because the latter is seldom adequately shown in the project management literature. I now summarise the five stages, and their accompanying articles, as follows.

### **Stage 1: Establish organisational strategic objectives**

- There is no universal 'standard' set of processes for strategic management.
- Strategic analysis is one of the more commonly shared processes. After discussing examples from the general and project management literatures, we looked at some of my own experiences in Lend Lease, including defensive planning, and supply/demand projections.
- We then looked at increasing movements towards more dynamic flexible approaches to strategy management, and at the combination of deliberate and emergent strategies, focusing particularly on the latter.
- Finally, it was noted that, whenever emergent strategies come into play, the existing strategic objectives need to be re-established and the whole strategic planning process correspondingly revised.

### **Stage 2: Develop strategic options, evaluate, and choose the best**

- This article first focused on the importance of developing alternative strategic initiatives, and offered a couple of relevant checklists.
- The focus then turned to the importance of getting reliable conceptual level estimates.
  - Some factors which mitigate against reliable conceptual level estimates include *the planning fallacy, optimism bias, and guesstimating.*
  - Different types of estimates include *expert judgement, analogous estimates, parametric (top-down) estimates, bottom-up estimates, and 3-point estimates.*

- The reliability of conceptual estimates can be improved by *finding or developing top class conceptual estimators*, and *involving project managers*.
- We can then develop 'outline' business cases for each alternative, & choose the best.

### **Stage 3: Augment and consolidate strategic initiatives**

- In first augmenting and elaborating the chosen strategic initiatives, we discussed
  - Elaborating 'outline' business cases from Stage 2 into detailed business cases
  - The nature of business cases
  - Involving project management in developing detailed business cases
- Rechecking and confirming feasibilities of the strategic initiatives lead to "go/no-go"
- We then prioritise, balance, and consolidate these initiatives into strategic portfolio(s)  
There are three different perceptions of the scope of portfolios and their management
  - *Main focus on selecting projects*
  - *Selecting projects plus substantial portfolio planning responsibilities*
  - *The above two plus subsequent execution responsibilities*

### **Stage 4: Execute *other strategic work* along with projects/programs**

- Some attributes of strategy execution were first discussed:
  - Many large organisations struggle to implement their strategies effectively
  - Strategy execution is not well covered in the literature
  - Strategy implementation/execution typically has many components
  - The two main components are programs/projects, and *other strategic work*
  - The magnitude of the *other strategic work* can be very substantial indeed
- An overview of *other strategic work* types and their management included
  - Types of *other strategic work*
  - Management of *other strategic work*
- Three different perceptions of *other strategic work* associated with organisational change
  - *Other strategic work* seen as an integral part of strategic programs/projects
  - *Other strategic work* undertaken by separate programs/projects
  - *Other strategic work* may be non-program; management means not identified
    - *Governance and management of major organisational changes*
- *Other strategic work* associated with transition activities
  - Preparing for transition
  - Actual transition activities
  - Operations and maintenance activities
- There are undoubtedly *other strategic works* not identified above
- Responsibilities for managing *other strategic work* could include strategic portfolio managers and in some contexts change managers.

## **Stage 5: Achieve strategic outcomes and realise benefits**

This has been summarised above, under the following main headings:

- Benefits and organisational strategy
- Program Benefits Management?
- Multiple strategic initiatives and strategic portfolios
- Management of benefits realisation
- Benefits for multiple stakeholders

Overall, I have tried to represent projects/programs as being part of the broader context of organisational strategic management, and to focus on the latter as being the 'main game' – a perspective which is all too seldom recognised in the project management literature.

Finally, I have not attempted a detailed exposition of the whole strategic planning and execution processes. I have focused mainly on factors which do not appear to me to be adequately covered in the project management literature – hence the somewhat eclectic nature of the contents of this series of articles. My hope is that some others may be stimulated to develop some of these factors in more detail.

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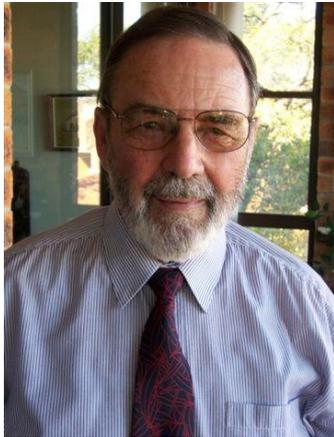
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