

## Representing “other strategic work” in addition to projects in an organisational strategic management context <sup>1</sup>

By Alan Stretton

### INTRODUCTION

In some recent articles in this journal I have been discussing projects in the context of their contribution to organisational strategic objectives. However, it is important to note that projects are not the only means needed to help achieve strategic outcomes. *Other strategic work* is also normally required. Together these two are the main components of a strategic initiative, which is described by Cook-Davies 2016:259 described as “...a project, portfolio of projects, other discrete programme or series of actions undertaken to implement or continue the execution of a strategy, or that is otherwise essential for the successful implementation or execution of a strategy”.

Rather naturally, the project management literature tends to focus on the contribution of projects, programs and portfolios of projects/programs to the execution of organisational strategies. It generally has relatively little to say about the other “series of actions” (as depicted in the above quotation) which are usually also needed to achieve the strategic objectives. Some writers (e.g. Buttrick 2016, PMI 2017) simply call this “other work”. I have adopted the terminology *other strategic work*, which tends to describe its context more precisely.

I first wrote about *other strategic work* in Stretton 2018g, specifically in the context of the execution stage of strategic initiatives (in addition to projects/programs). However, *other strategic work* is initiated and developed in earlier strategic management stages, and is also of key importance in the final stage of transition to achievement of business outcomes and realisation of benefits. This somewhat exploratory article will broaden my earlier discussions to embrace these wider contexts.

This article will first discuss the nature and potential magnitude and importance of *other strategic work*, which can sometimes be very substantial, and occasionally dominant. We will then look at how *other strategic work* can be seen to develop in parallel with projects/programs in the organisational strategic management context, except for the transition stage from strategic initiatives to strategic outcomes and benefits, where *other strategic work* is normally dominant.

This will be followed by discussions on some differing views on how management of *other strategic work* relates to the project management component, and to organisational strategic management at large. These three are highly intertwined, and we conclude that a broader study of managerial responsibility for the various entities of the organisational strategic management framework could be worthwhile.

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## **THE NATURE AND IMPORTANCE OF *OTHER STRATEGIC WORK***

I have not found it easy to be all that precise about the nature of *other strategic work*. To paraphrase Buttrick 2016:367, *other strategic work* can be very diverse, and the approach to it has to be determined on a strategic-initiative-by-strategic-initiative basis, depending on the context, and the type of work being undertaken.

The best I can do at this stage is to describe *other strategic work* as additional work, over and above prescribed projects/programs/portfolios, that is usually also required to help progress strategic initiatives and realise strategic benefits.

### **Types of *other strategic work***

The literature nominates many types of other strategic work, including

- Business change (Dalcher 2017, Hudson 2016)
- Organisational change (Buttrick 2016, Dalcher 2017, Demaria & Sopko 2016, Koch & Lock 2016, Sedlmayer 2016)
- Education, training, behavioural change (Dalcher 2017, Hudson 2016, PMI 2017)
- Operational management/changes (Buttrick 2016, Hudson 2016, PMI 2017)
- Service management, maintenance functions (Buttrick 2016, PMI 2017)

In Stretton 2018g I grouped these into two broad overlapping categories, namely

- Organisational change, and
- Transition activities

However, the above is only a small sampling, and there are undoubtedly many more types of *other strategic work*.

### **The potential magnitude and/or importance of *other strategic work***

When I first discussed *other strategic work* in some detail in Stretton 2018g, I noted that Dalcher 2017 indicated that it could comprise up to 80% of the total investment in realising benefits in an IT system context, and quoted from him as follows:

Realising value from the investment requires action beyond the mere delivery of IT systems; it necessitates real change within the organisation to enable the new systems to be utilised. The change would often impact many other aspects including: the nature of the business itself; business processes; skills and competencies; and the organization. Such change, which is not IT-specific, or even project related, could often account for up to 80% of the total investment.

I also commented that this somewhat dramatically high proportion of *other strategic work* was not all that much out of line with my experience with substantial internal strategic change initiatives in Lend Lease, where, in some cases, *other strategic work* was (perhaps arguably) more significant than the initial change projects.

I exemplified a large IT-related internal project (“Calnet”), where the work of educating users throughout the organisation and helping them to use the new system effectively was actually more substantial than the original project.

Hudson 2016:432 discussed a somewhat similar situation, as follows.

Programme benefits don't just happen as a result of new IT systems or process capabilities. They need business or behavioural change activities to realize the potential value. ....

For example, the process design for an IT project may identify operational changes that can be deployed before the system development.

However, the need for, and importance of, other strategic work is not confined to IT strategic initiatives. In the context of quite a different type of program (a “Virtual Centre”), Sedlmayer 2016:310 says,

A fundamental change through a programme can hardly be successful through the programme alone: changing the organizational set-up of the company was essential to unlock endless discussions.

Another example of the importance of *other strategic work* was briefly discussed in Stretton 2018g, in relation to BA's Heathrow's Terminal 5, whose construction “was lauded as a success, from a time, cost, scope and quality perspective” (Bourne 2015). However, from its opening in March 2008 flights had to be cancelled, passengers were stranded, and more than 15,000 pieces of baggage were lost. Why? One of the main basic causes was lack of staff preparation and training in understanding and operating the new facilities, notably in the baggage handling domain. The importance of this absolutely key *other strategic work* needed to make Terminal 5 operate as intended had failed to be recognised, with rather devastating consequences.

PMI 2017 presents its materials on programs in a context-free mode. It recognises the importance of *other strategic work* (which it calls “other program-related activities”), and comments on these as follows.

**Other program-related activities** are work processes or activities that are being conducted to support a program, but that are not directly tied to the subsidiary programs or projects sponsored or conducted by a program. Examples of processes and activities sponsored by programs may include those related to training, planning, program-level control, reporting, accounting, and administration. Operational activities or maintenance functions that are directly related to a program's components may be considered as other program-related activities.

It can be seen that PMI 2017 has added some *other strategic works* which are additional to those discussed in the previous section above.

In summary, this section has highlighted many examples of strategic initiatives in which various kinds of *other strategic work* have been substantial and/or important.

## PARALLEL DEVELOPMENT OF OTHER STRATEGIC WORK AND PROJECTS

### Project processes in an organisational strategic management context

In Stretton 2018g I related the project component of strategic initiatives to an organisational strategic framework in the context of the processes of a basic project life-cycle, as shown in Figure 1 (with some minor amendments from the original). The project components are briefly described above summarised project life-cycle (PLC) headings. I have provided for iteration between phases as shown.

ORGANISATIONAL STRATEGY PLANNING			ORGANISATIONAL STRATEGY EXECUTION	
1. Establish strategic objectives	2. Develop strategic options, evaluate, choose the best	3. Augment/consolidate strategic initiative(s)	4. Execute strategic initiatives	5. Achieve strategic objectives.
Establish/ re-establish the desired deliberate/emergent strategic outcomes and benefits	Develop alternative strategic initiatives to achieve strategic outcomes / benefits. Evaluate alternatives. Choose best option(s)	Augment and elaborate chosen strategic option(s). Confirm feasibilities. Prioritise and consolidate into strategic portfolio(s).	Execute projects/ programs and other strategic work to facilitate achievement of strategic objectives	Achieve strategic outcomes and realise benefits
PROJECT COMPONENT OF STRATEGIC INITIATIVES	Alternatives include potential projects. Making the best choice originates the on-going projects	Augment/consolidate basic parameters of component projects. Prioritise projects	Design, plan and execute projects/programs	Iterate as needed
	[PLC – PROJECT LIFE-CYCLE]	Project Incubation Phase	Project Feasibility and Definition Phases	

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

### Some parallel other strategic work processes

It can be seen that the only specific mention of *other strategic work* in Figure 1 is in Stage 4, the execution stage of the strategic framework.

However, under *Stage 2*, the summary above *Project Incubation Phase* notes that alternative strategic initiatives include potential projects. This directly implies that the initiatives could also include other strategic work, which is also originated when the choice of the best initiative(s) is made. In the absence of equivalent guidelines, it appears appropriate to describe this stage as *Other strategic work incubation*, which I have illustrated in Figure 2 below (which uses only the summary headings for the strategic stages and the project life-cycle from Figure 1 above).

Moving on to *Stage 3* of the strategic framework, the related project phases are described as feasibility and definition, and it would seem appropriate to follow a similar course as in *Stage 2* in describing the parallel processes as *Other strategic work feasibility and definition*, as shown in Figure 2.

The equivalent processes in *Stage 4* are now described as *Other strategic work design and execution* stages, parallelling their project equivalent.

However, when we come to *Stage 5*, it is comparatively rare for project management to have more than a relatively marginal input into the processes of achieving the strategic outcomes and realising the benefits. Consequently, this is where *other strategic work* becomes particularly important. I have described this as the *transition stage*, with the sense that it represents the work required to transition the executed strategic initiatives into strategic outcomes and benefits. It is therefore described as *Other strategic work in the transition stage*.

OTHER STRATEGIC WORK CONTRIBUTION	Other strategic work incubation stage	Other strategic work feasibility and definition	Other strategic work design and execution	Other strategic work in the transition stage
1. Establish strategic objectives	2. Develop strategic options, evaluate, choose the best	3. Augment/consolidate strategic initiative(s)	4. Execute strategic initiatives	5. Achieve strategic objectives.
PROJECT(S) CONTRIBUTION (PLC)	Project Incubation Phase	Project Feasibility and Definition Phases	Project/program Design and Execution Phases	

**Figure 2: Abbreviated strategic management framework, PLC, & “Other strategic work” stages**

We now go on to discuss managerial responsibilities for *other strategic work*.

### MANAGERIAL RESPONSIBILITIES FOR OTHER STRATEGIC WORK

There are three broad perspectives on responsibilities for the management of *other strategic work*:

- *Other strategic work* seen as an integral part of program/project management;
- Some *other strategic work* is undertaken by separate programs/projects; and
- Some *other strategic work* is undertaken as non-project work

We will now look briefly at each of these perspectives.

#### ***Other strategic work* is seen as an integral part of program/project management**

If I have interpreted them correctly, this appears to be the dominant perspective of Buttrick 2016, Kock & Lock 2016, and PMI 2017. The implication is that the relevant *other strategic work* is managed by program/project managers. I have some problems with this perspective.

- Program/project managers are seldom in charge of pre-execution stages of the strategic management framework. In particular, *Stage 2* is generally undertaken with little, if any, project management input. Involvement by project management in *Stage 3* is very variable in practice, but, here again, it appears to be comparatively rare for project managers to actually manage all of these processes, although they sometimes manage some of the latter processes. When they are not in a position to manage the project components of the strategic initiatives in *Stage 3*, project managers will most certainly not be in a position to manage the associated *other strategic work*. So, who does manage the latter, and its associated projects? Presumably someone from the organisational strategic planning domain – but who?

- In similar vein, but very different context, program/project managers are seldom involved to any significant degree in managing processes in *Stage 5 – the transition stage*. Various types of *other strategic work* dominate in this stage, and are generally managed by specialists in the particular types of transitions being undertaken – and therefore rarely by project managers. But, in these circumstances, who provides the continuity to ensure that the *other strategic work* outputs (and very often also the project outputs), properly contribute to the transition processes? By default, this would appear to be the responsibility of someone in the organisational strategic management domain.
- On balance the only stage where it would be practical for project management to also manage other strategic work would be in Stage 4 of the organisational strategic management framework. However, even here there are potential impediments to project management undertaking this work.
  - One such potential impediment is that the types of skills needed to effectively manage some types of *other strategic work* can be very different from the typical skill sets of program and/or project managers. This could be particularly relevant if the other strategic work is not amenable to being organised in project format. In these circumstances, who would be responsible for managing other strategic work? A strong candidate could be a Strategic Portfolio Manager, if one has been appointed.
  - Another potential impediment is that, in certain contexts, the sheer volume and diversity of *other strategic work* – whether capable of being organised into project format or not – could necessitate its being managed by others. In these circumstances, management responsibilities could be additional project managers if the former applies, or a different type of specialist in the latter case. The former situation is represented by some as a second perspective on managerial responsibilities for *other strategic work*, to be discussed in a moment.

Summarising this perspective, it is concluded that regarding *other strategic work* as an integral part of program/project management would appear to be appropriate only in some very limited contexts.

### **Some *other strategic work* is undertaken as separate programs/projects**

This perspective is mentioned or implied in Demaria & Sopko 2016 and Hudson 2016. It was also an approach we sometimes took in the project-based Civil & Civic, in cases where the magnitude and/or importance of the *other strategic work* were sufficiently substantial to warrant doing so. In such cases, the overall strategic initiative effort, including the *other strategic work*, were generally under the management of a program manager.

I suspect such an approach would also tend to be favoured by other project-based organisations. However, in production-based organisations, this perception would appear to be viable only in those organisations with very substantial maturity in the program/project context.

In this context, it should also be noted that a separately managed project-based *other strategic work* is likely to have similar restrictions as above regarding its applicability in Stages 2, 3 and 5 of the organisational strategic framework. This again raises the question as to who is responsible for managing the *other strategic work* in these stages.

A further experience we had in Civil & Civic was that certain types of *other strategic work* simply did not lend themselves to being organised and managed as projects – which bring us to the third perspective on managerial responsibilities for such work.

### **Some *other strategic work* is undertaken as non-project work**

This perspective gets little mention in the project management literature, but, as just mentioned, is quite common in practice in my experience. For example, I found that helping implement new internal systems for which I had been project manager was a perceive-the-need-for-help-and-do-something-about-it type of on-going obligation which was of a distinctly non-program/ project nature (and also rather challenging in many instances). Others in similar circumstances had much the same experience.

However, managing non-project *other strategic work* is not an easy subject to discuss, particularly because the nature of such work can be highly variable, entailing a corresponding variety of managerial skill-sets.

### **Concluding this section**

Overall we have a very mixed bag when it comes to the management of *other strategic work*. In some cases this work can be organised into project format, but usually project management involvement will be minimal in strategic management Stages 2, 3 and 5, where other entities, presumably from the strategic management area, will be responsible for management in these stages. We will also have much the same kinds of questions to ask about the management of non-project *other strategic work* in all Stages from 2 through 5.

Consequently, because the management of *other strategic work* is so intertwined with both the management of component projects of strategic initiatives, and management of organisational strategic management at large, it would appear worthwhile to try and approach the question of managerial responsibility for the various entities of the organisational strategic management framework from a broader perspective. It is proposed to undertake such an approach in the next issue of this journal.

### **SUMMARY**

This article has focused on the *other strategic work* which, in addition to projects, is normally required to help achieve organisational strategic objectives. We first briefly discussed types of *other strategic work*, and then looked at what the literature says about its potential magnitude and importance, which can sometimes be very substantial, even to the point of exceeding that of component projects.

We then looked at how *other strategic work* can be seen to develop in parallel with projects/ programs in the organisational strategic management context, by first looking at how projects relate to this context, and then proposing some parallels for *other strategic work*.

This led to discussions on some differing views on how management of *other strategic work* relates to the project management component, and to organisational strategic management at large. These three are highly intertwined, and we concluded that a broader study of managerial responsibility for the various entities of the organisational strategic management framework might help sort out some of the grey areas of such responsibilities. It is proposed to address this topic in a following issue of this journal.

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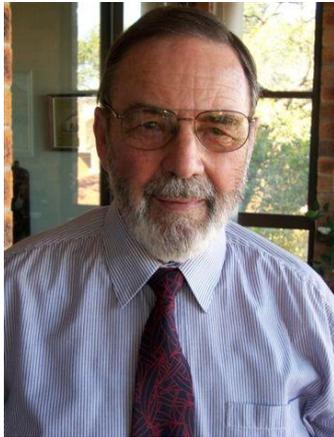
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