

## **Lessons Learned but Knowledge Lost!**

### **How to Capture the Experiences, Knowledge and Wisdom of Aging and Retired Project Managers and Professional Leaders**

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#### **Introduction**

As you will have read in the tribute to Marcio Prieto this month, the project management world has lost another deeply experienced project manager and project management professional leader – one of the most respected PM leaders in Brazil and all of Latin America. While preparing that tribute, I studied Marcio's background, saw that he worked on many projects related to transportation, water, wastewater, information systems and strategic organizational change. In addition to his industrial and technical experience, he was a founder and leader of PMI chapters in Sao Paulo, one of the early leaders in advancing professional project management throughout Brazil, including in the government. Marcio's passing reminded me of other project managers and professional leaders that I have known personally who have passed away in recent years, without having very much of their background and experiences documented or otherwise captured.

While the Project Management Institute (PMI®) has implemented a "Hall of Leaders" on their website [1], it only includes the names and dates of past PMI leaders such as PMI Founders, Fellows and Chairs of the Board of Directors. The PMI Board of Directors website [2] contains access to background information for current board members only, while another web page identifies members of past boards of the Institute. None of these capture the experience or knowledge of these professional leaders, and nowhere else on PMI's website does the organization seem to capture, acknowledge or value the backgrounds, experience or wisdom of individual leaders.

Likewise, the International Project Management Association (IPMA) only shows the photographs and contact information for current Executive Board members [3], without full profiles. I can find no information at all about past executive boards or IPMA leaders. Some IPMA member associations do a better job, showcasing leaders with more background information – for example, the Azerbaijan Project Management Association [4], Association for Project Management in UK [5] and Australian Institute of Project Management.[6] Many professional associations recognize and showcase past award winners, or leaders at the highest levels. But

literally none that I could find showcase past officers or volunteer leaders, nor provide their backgrounds. This includes chapters and branches of larger societies.

Likewise, it is well known in the United States, Western Europe and Japan that some industries are facing serious shortages of senior program and project managers as more executives and senior managers retire. This is the case in aerospace, healthcare and medical services, construction, oil & gas and others. While large industrial organizations adopt various strategies to retain, hire and grow new and more qualified leaders, what are they doing with regards to capturing the experience and knowledge of their older, more experienced and often highly successful program and project managers? It seems to me that many organizations are just letting extremely valuable resources walk out the door, through downsizing, retirement or even death, with little or no effort to capture the lessons learned, knowledge gained or wisdom from those individuals. That knowledge and wisdom should be valuable, often reflecting many thousands of dollars invested over many years.

Finally, from the perspective of the aging or retired project manager or professional, what can he or she do to share some of the knowledge gained over 30, 40 or even 50 years of experience? Of course, many retiring program and project managers are tired, ready to enjoy some peace and less work, or actually wanting to forget about their years of hard work. But many others may find retirement boring, undesirable or even unexpected. For many professional leaders, they are forced into retirement when their terms of office expire, committees end or leadership roles are transferred to others. I believe there are many individuals who want to be more engaged, who would be willing to share their experiences, and who simply don't see opportunities to do so. This article is for those who want to stay or get involved in the project management profession.

### **Some Personal Experience**

I may not be the world's expert on too many subjects, but I know more about my own personal project experiences than anyone else. Perhaps my experiences, perspective and stories would be useful to others. And what stories I could tell!

For example, the first big project that I worked on as a professional was the \$200M+ Loss-of-Fluid-Test (LOFT) Project in Eastern Idaho during 1976-1980. LOFT had it all – design and construction of a 25% scale nuclear test reactor; development of new software and information systems for operating the reactor and associated systems, and for conducting and analyzing various loss-of-coolant accident tests; implementation of a big new project management software system; fully integrated scope, schedule, cost across the project using earned value reporting; teams of engineers, scientists, professionals and construction workers; multiple contractors and a deep supply chain; multiple international stakeholders –

funding from about a dozen countries; oversight and reviews by the US federal government; robust state regulatory environment; and multiple risks associated with both the project itself and live nuclear fuel in the test reactor.

I have some great experiences and stories from the \$10B+ Superconducting Super Collider (SSC) project in Texas (1989-1992), where many of the leading physicists in the world came together to create the world's largest high energy physics laboratory (later built at CERN in Switzerland). Cancelled by the US congress in 1993, the SSC was a classic example of where better project management governance was sorely needed; it was weak PM that killed the SSC, not bad science, engineering or performance.

And what stories I can tell from my travels around Russia in the 1990s, when I met with industry and government officials, reviewed various projects in need of investment or development, made presentations on project management, and traveled to some very unique places. Those projects included organizing a team of companies and experts to redesign and develop a new airport terminal in the city of Yakutsk (on the Lena River 8 time zones east of Moscow); a project to deliver and sell a Gulfstream jet to the President of the Sakha Republic; PM support and training to Corporation Twentieth Trust in St. Petersburg for the company's proposed Tower Peter The Great project; and reconstruction of water and wastewater treatment facilities in Sochi on the Black Sea, site of the 2014 Winter Olympic Games where Russia is now pouring money into new infrastructure and facilities. I traveled to Russia more than 30 times during a four year period, with each trip lasting at least two weeks. I coined the term "project hunting" to describe my adventures, and every trip was a real adventure!

I could go on, but I think many experienced executives and project managers have similar stories. What were the lessons learned? Will all of those experiences and the knowledge gained be lost? That does not need to be the case.

### **What are the issues?**

The main questions, in my opinion, would seem to be the following:

- How can aging and retired project managers and professional leaders capture or document their project experiences and knowledge?
- How can aging experts and leaders share their experiences and knowledge with younger leaders, those still involved with managing programs and projects?

- How can commercial companies or governmental organizations capture the experiences and knowledge of retiring program and project managers, and other experts and leaders?
- How can professional organizations recognize past leaders, and make their knowledge and experiences available to others?
- How can program and project managers, and PM experts and volunteer professional leaders, gain the recognition that they deserve, after years or even decades of work?
- How can the knowledge and wisdom of aging experts and leaders be captured, saved and made available to the world? That is, how can the loss of PM knowledge and wisdom be prevented?

### **Options for Individuals**

Here are some ideas for individuals:

- **Update your CV or Résumé** – This may seem surprising, but it can be helpful to update one's resume at the end of your career. I think this is something most professionals stop doing as they approach retirement. If you want to share knowledge, then prepare a good, fairly robust chronology of your work and professional experience, positions, companies and projects.
- **Inventory Projects & PM Experiences** – Assess the projects that you worked on. What were the most interesting aspects? What lessons were learned? Which projects were successful or failures, and why? How were the project teams organized? Were there any special or unusual project characteristics or circumstances? What should have been done differently or better? What happened to the products of the projects?
- **Prepare a Digital Library** – Have you digital files of all significant articles, papers, reports or presentations that you have made over the years? Many may, in fact, be proprietary to the organizations for whom you worked, but some may be professional papers presented at conferences, articles published in books and journals, presentations at internal or external events, training materials, or even status reports. While projects are often defined as one-of-a-kind endeavors, most projects resemble others that have been completed previously. Many aspects of project management can be transferred to other projects. How many of your articles and presentations could be useful today?

- **Author New Articles and Papers** – Consider authoring an article or paper for publication now. Many conferences, magazines, journals and other publications and organizations would welcome articles authored by seasoned experts or retired leaders. With **PM World Today**, we offer a variety of categories for articles and papers, including Viewpoints (opinion-based articles on any aspect of program or project management), Featured Papers (serious professional papers, with references), Advisory Articles (papers aimed at solving problems or addressing PM-related issues), Case Studies (articles about actual projects, to showcase solutions), and Personal Stories (to encourage the sharing of personal experiences on projects). Authoring and publishing new articles and papers, based on one's experience, may be the most obvious way to share knowledge. There are many options for publishing such articles, including local publications and those of many non-profit organizations.
- **Make Presentations** – Many organizations are looking for speakers, including many local non-profit organizations. Presentations can range from full-blown professional presentations at conferences, meetings and seminars, to less formal luncheons, meetings and events. If you have written an article or paper, you could make a presentation on the same topic. Any of your project experiences could be the source or subject of a presentation that might be of interest to others with similar programs or projects, or in similar industries. Most PM professional associations solicit papers and presentations for their annual events each year: watch for "Calls for Papers."
- **Tell Stories** – Story telling is the world's oldest form of teaching and transferring knowledge from older to younger generations. That is still true today. In my opinion, story telling is one of the most under-utilized but most effective forms of knowledge sharing. Stories generally include personal knowledge, perspectives, emotions and thoughts – which distinguish them from more formal and written forms of expression. Of course, written stories can be powerful as well, but listening to stories from older, more experienced project managers has always had a powerful effect on me. And I can still remember some of the anecdotes, clichés and advice that I have gained from those much older than I over the course of my career. I can still remember a few personal stories told by professors from my undergraduate courses 40 years ago.
- **Volunteer** – If you want to be involved in the PM professional world again, one of the best and easiest ways is to volunteer with your local PM association, branch or chapter. These organizations are always looking for volunteer leaders, especially those with both good experience and availability. Volunteering is also a way to give back to one's profession. In any case, it is a great way to identify the ways and means to publish articles, make

presentations, share knowledge and/or gain some visibility. Many non-profit organizations offer ways for older or retired former leaders to volunteer, for example, visiting schools, teaching courses, leading other volunteers, or actually managing a project.

- **Advise** – Become an advisor or a mentor. With the increasing emphasis on governance, more opportunities are appearing for older, experienced project management experts to provide independent advisory services for organizations. Your current or past employer may offer opportunities to mentor younger project managers or professionals. You may or may not be paid for such advisory support, but you will gain recognition and the gratitude of those you advise.

These are just a few ideas that come to mind. I am sure that our readers can identify others.

### **Options for Organizations & Industries**

How can organizations afford to lose the knowledge and wisdom of older workers? Yet this seems to be the most common situation. Here are a few things organizations might do to capture or retain some of that PM knowledge:

- **Project Close Out and Lessons Learned Reports** – A simple first step is to make sure that project close-out and Lessons Learned reports are prepared for every project. Such reports might include input, opinions and perspectives of all members of the program or project leadership team. Obviously, the documentation of what worked well and what mistakes were made can be invaluable information for any organization.
- **PM Knowledge Libraries** – Some organizations have created knowledge centers and/or libraries, containing program and project management reports, lessons learned, cost estimates, standards and other information. Such libraries can include reports or papers by more senior executives, program and project managers, technical staff and others. With modern technology, such knowledge libraries are not expensive to establish or maintain, and can be accessed from anywhere via the internet.
- **Seniors in Training Workshops & Seminars** – Internal project management courses, workshops and seminars should always include senior managers from the organization; they can not only share their experiences and knowledge, but clarify how policies, practices and tools can or should be applied on projects within the organization. Such perspective can be invaluable, reducing the risk of problems later on and improving the learning experience for the younger professionals.

- **Mentor Programs** – Mentoring programs have also become more common, as more organizations recognize the wisdom of teaming younger professionals and managers with more senior program and project leaders. Knowledge sharing occurs automatically. What could be more powerful than combining the education, technologic savvy and energy of young leaders with the experience and knowledge of a seasoned program or project manager?
- **Internal Publications** – Most larger organizations, whether commercial, governmental or non-governmental, publish internal newsletters, magazines or other communications to keep employees informed. These publications can be used for publishing articles, papers or stories by older, more experienced program and project managers, or even technical and scientific staff. NASA is very good at this. The monthly “ask the academy”, published electronically by NASA’s Academy of Program, Project and Engineering Leadership (APPEL) includes articles and stories by NASA program and project leaders. It’s a great model for other organizations.
- **Story Telling Sessions** – Plan and schedule opportunities for senior and experienced executives and project managers to share stories, lessons learned or personal experiences. These could be “brown-bag” lunch sessions, incorporated into training programs, included in social events, or offered as optional learning opportunities. With the right visibility and publicity, both speakers and listeners will participate.
- **Recognition Programs and Websites** – Organizations can and should do a better job of recognizing older workers, especially those who have been responsible, either in whole or in part, for a successful program or project. Why not create a website, either for internal use or open to the public, with summary background information about senior staff? Just identifying the projects on which someone has worked can present opportunities for sharing knowledge about those projects with others who might benefit. Certainly those showcased on such websites would welcome and value the recognition.
- **Post-retirement Programs & Opportunities** – Many retirees are available for part-time work or involvement back with the organization. Why not invite retired program and project leaders back to help mentor younger leaders, document their knowledge for the benefit of the company, or otherwise find ways to benefit from their experience and expertise.

### **Options for the Project Management Profession**

Many of the options identified above for commercial and governmental organizations can also apply to professional organizations, including local, national

and international bodies. In addition, however, I think that professional and non-profit organizations should do a much better job of recognizing leaders and volunteers. That recognition should not just include names, titles and dates, but some personal background information. More professional organizations should include a leaders recognition website, in my opinion, where all leaders can be recognized, not just the chairs of the board, Fellows or award winners. I know dozens of PMI and IPMA leaders, for example, who provided hundreds of valuable hours of volunteer leadership time, only to be forgotten when their roles or involvement ends. That is a shame! And every one of those individuals brought unique experiences and knowledge to their activities and societies.

## **Conclusion**

I know that many experienced program and project managers many not like to write articles or papers, or may not have high confidence in their writing ability. If that is the case, don't worry. Writing ability and style are much less important than the experience and knowledge that can be shared. So if you are one of those, over 60 and near or past retirement, please consider sharing your stories.

A few years ago, I thought that an independent Project Management Hall of Fame had merit, even discussing the idea with some advisors and colleagues. I also think that a general service for PM leaders to post their résumés, papers and presentations might be of value.

Certainly, much more can be done to capture and share the experiences and knowledge of aging program and project managers, and project management experts and leaders. This article has been intended to raise this issue, ask some questions and suggest some options, for both individuals and organizations. It was disheartening to lose Marcio Prieto, another project management expert and friend, this month, and to realize again that I would never have that opportunity to interview him, ask him more about his favorite projects, or try to capture some of the deep experience and knowledge that he had. We tried to capture some of it in the Tribute (please read it), but it was impossible to capture very much.

Finally, I want to pay homage to Russ Archibald, PMI member #6, 87 years young and still going strong, with whom I am working on a US National Nuclear Security Administration program. Russ is proof that age does not coincide with less value, just the opposite. Russ is an encyclopedia of project management experience and knowledge, and I am honored to be working with and learning from him. I am sure there are many others like him. Older professional leaders and PM experts are a global resource, deserving of both attention and recognition.

If you have a comment or suggestion related to this editorial, please send an email to me. Thank you for reading **PM World Today** this month.

**References:**

- [1] <http://www.pmi.org/About-Us/Leaders-Hall-of-Leaders.aspx>
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