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Alexander and the Indian King: Part 1
by John Schlichter
Commentary

Alexander and the Indian King

Part 1[1]

John Schlichter

Some people believe the Project Management Institute's primary purpose should be to advocate the project management profession (the profession of the vast majority of its members) through standards applicable to all projects and certifications that denote competence in those standards, which legitimizes practitioners as professionals. Ancillary activities may include hosting conferences pertaining to all aspects of projects, facilitating networking events that help project management practitioners associate with each other globally, and publishing educational materials that increase knowledge regarding all aspects of project management. This view prioritizes institutionalizing project management throughout society. Alternatively, others believe PMI's primary purpose should be to ensure the growth of PMI through profitable commercial endeavors whereby PMI provides all manner of professional services in ways that elevate the profile of the institute. That view prioritizes scaling the institute, which some critics argue looks like empire-building. While the latter (scaling the institute) could certainly be used to support the former (institutionalizing project management), which takes priority? In either case, where do we draw the line between PMI's nonprofit role to do charitable work in the interest of elevating the *field* of project management to the *profession* of project management and PMI's commercial role to dominate profitable ventures to scale the institute? Does PMI undermine itself by offering professional services?

By comparison, other trade associations like the American Medical Association and the American Bar Association largely eschew professional services from their menus. There are some exceptions, instances of professional services corresponding to the unique concerns of members, e.g. risk retention or insurance. But trade associations largely limit their activities to the development of standards, the management of certifications, and the distribution of educational materials, which is why the AMA is not a healthcare provider and the ABA is not a law firm. PMI's incoming CEO would do well to make this distinction as PMI engages in the most fundamental question of strategy, namely deciding courageously *what not to do*, and as leaders ranging from Jack Welch to Jagdesh Sheth have said, doing that by focusing on differentiation, making PMI's specialization(s) *sticky*, emphasizing strategy implementation in a way that is transparent and honest. To my mind PMI's leaders should start by revisiting PMI's values, beginning with consideration of perceptions that past decisions fomented and the implications for redressing those perceptions by recasting PMI's values. If PMI's next CEO were to recast PMI's values in a way that prioritized institutionalizing project management by focusing exclusively on delivering only those products and services that PMI alone can furnish in its role as the premiere trade association for project management, the chief executive could expect to be celebrated like Alexander the Great upon cutting the Gordian Knot and fulfilling the prophecy that doing so would unite the world.

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Popular accounts tell us Alexander encountered the knot early in his campaign and that an oracle had foretold the man to free its intractable yoke would become the ruler of all Asia. Alexander slashed the knot in two with his sword and then conquered the Achaemenid Empire of Persia before proceeding into India's subcontinent, which the Greeks believed marked the end of the world. Once there, upon defeating an Indian king, Alexander asked the royal how he wanted to be treated, and the proud king invoked the Golden Rule, replying "How would *you* wish to be treated?" Alexander was so impressed by the king that he returned his lands and title. An alternative history told by some Indians to this day is that Alexander was defeated by the king, whose war elephants literally unseated Alexander, who fell from his horse on the battlefield and broke his back, inspiring Alexander to ask for a halt to hostilities. By that account, the Indian king agreed to his opponent's plea for peace, as that was the Indian custom, not only invoking the Golden Rule but embodying it. In either case, whether the legacy belonged to the emperor or to the king, a leader had brought peace to the land by *invoking values* and *choosing courageously what not to do*. Therein lies a lesson for PMI's incoming CEO, which I would enroll the executive to reckon by recounting a more recent history in what follows.

I represent many people involved in the creation of PMI's foundational standard called *OPM3* (Appendix A). It is clear to me that significant differences abound between the facts of what transpired in the evolution of OPM3 and perceptions of those facts, and the implications reach far beyond OPM3 itself, challenging PMI's identity, its fidelity, and even its viability. Soon after OPM3's publication, PMI entered the software business, removed the most valuable components of OPM3 from the standard, and sold them at a price orders of magnitude higher than any PMI standard to date as software named ProductSuite, a database version of OPM3. Users were supposed to use ProductSuite to perform assessments of organizations and plan improvements based on those assessments. That is what happened, but what some people made it mean was that PMI valued revenue and control more than promoting goodwill and freedom. Though I doubt PMI believed such a trade-off had occurred, it is clear to me confusion about it resulted from different views of values. And after PMI removed OPM3's most valuable components from the standard, PMI withdrew those components altogether from the marketplace. Consequently, OPM3's users could no longer use OPM3 to assess organizations accurately and improve their organizations' capabilities in the many ways that OPM3 was designed to help them improve their capability to implement strategies through projects successfully, consistently, and predictably. That is what happened, but what some people made it mean was that PMI failed to respect an implicit agreement with volunteers that the fruits of their labor would not be abandoned. PMI acquired its own consultancy as a subsidiary of PMI to provide assessments for hire using a proprietary model which was not OPM3. PMI viewed ProductSuite and this other new model as apples and oranges, not as a replacement of one by the other. That is what happened, but what some people made it mean was that PMI's noble charter to institutionalize project management had been compromised and that PMI's charitable functions had given way to profit motives that personified their fears. Eventually PMI decommissioned that acquisition, which brings us to the present. Looking back, PMI's executives and PMI's volunteers had shared the goal of supporting project managers and elevating the profession, but there was great division between different camps who envisioned accomplishing that shared goal in very different ways.

I believe that in the case described above an organic sequence of events occurred, driven by a persistent logic that has dominated PMI for the better part of twenty years, a logic that confuses ideas in the minds of many stakeholders about what PMI should do (i.e., institutionalism) with ideas about what PMI can do (i.e., commercialism). I believe some of the people involved may

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not fully appreciate the distinction. Others may simply believe "institutionalism versus commercialism" is a false dichotomy. Whatever the case may be, different views about PMI's values appear to have produced different ideas about how PMI should serve society. Recognizing the presence of a plurality of views regarding PMI's values, we should create the possibility of discussing disagreements about these things publicly to cultivate *empathy and alignment*, which creates an internal consistency that produces strength, which is called *integrity*. These are *values* relevant to PMI's mission, which I have imagined in the hope that discussing values dispassionately will resolve rampant division and lead PMI away from a ditch that lies dead ahead and into an unimaginably awesome future that transforms the way we live, work, and play as a species.

> "Leaders must modernize, prioritize, and then utilize their core values as critical decision-making filters for their organizations."

Ryan Berman, author of *Return on Courage*, wrote "Values-based, socially responsible, and purpose-driven companies are the ones that are winning today's business game." In his book*,* Berman presents a business model for what he calls "courageous change." He wants organizations to take thoughtful, calculated risks when developing a new product, implementing an innovative strategy, or simply voicing an opinion that upsets the status quo. Berman's five-step process, called P.R.I.C.E., is based on his experiences advising prominent brands like Major League Baseball, PUMA and Subway, as well as interviews with leaders from Apple, Google, Dominos, Zappos and other successful companies. The process includes five steps undoubtedly familiar to PMI's next CEO:

- Prioritizing Through Values – Leaders must modernize, prioritize, and then utilize their core values as critical decision-making filters for their organizations. Leaders must strive to embody those values in everything they do as leaders and as an organization.

- Rallying Believers – Leaders who are cheerleaders to their followers are not effective. We must create believers out of an organization's employees, prospects, customers, and stakeholders. Believers may deliver bad news from time to time, but they always put the organization first and prioritize what the organization needs, even when it's difficult.

- Identifying Fears – Performing an audit of fear is a more up-to-date, effective way to perform a SWOT analysis. Successful businesses proactively smoke out and address their stakeholders' biggest fears instead of suppressing them. By identifying fears — industry fears, product fears, service fears, and perception fears — organizations begin the process of conquering their most complicated problems. They drum up courageous solutions that shrink down these difficult, progress-halting hurdles.

- Committing to A Purpose – A powerful purpose is more than just words. Having an authentic cause drives conviction and keeps people motivated to work (or volunteer), even on tough days. True purpose becomes ingrained in an organization's culture. Injecting a "rally-cry-in-your-why" permeates outside the walls of an organization to transform customers and stakeholders into raving fans.

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- Executing Your Action – When it's time to innovate, courageous organizations get their most meaningful messages into the hands of advocates by utilizing the 4 P's – Passion, Precision, Promoters, and a Point of View.

To the extent that PMI's executives can view disagreements through the lens of *empathy*, this article can help them get PMI's P.R.I.C.E. right, starting with the prioritization of values that predicate a differentiation strategy for PMI. I offer the following values to start that process (followed by carefully articulated definitions for these values in the appendix):

- Accountability
- Appreciation
- Aspiration
- Clarity
- Coherence
- Discernment
- Empathy
- Empowerment
- Freedom
- Integrity
- Openness
- Pragmatism
- Privacy
- Prudence
- Purpose
- Responsibility
- Usefulness
- Wisdom

PMI's next CEO would be wise to consider the sequence for developing these values (Figure 1). The sequence holds the secret to slashing the Gordian Knot. My proposal is that PMI's leadership and stakeholders would collaborate on the elaboration of these values in a sequence that enables learning and iterating as the basis of renewal and transformation. Doing so could help PMI's next CEO make an existential choice between two mutually exclusive alternatives: *1) increasing PMI's commercialization in ways that risk trading the institute's noblest aspirations for more pedestrian ambitions, or 2) eschewing PMI's commercialization in pursuit of PMI's true purpose: reification of the profession most essential to solving the* wicked problems *that* humanity *faces in the* exponential future accelerating toward us.

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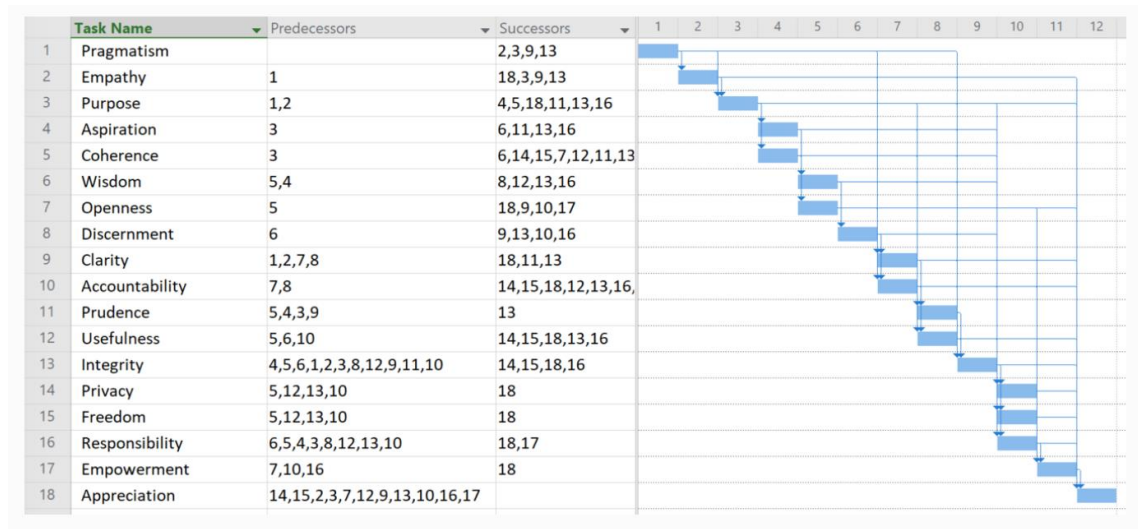|	Task Name	Predecessors	Successors	1	2	3	4	5	6	7	8	9	10	11	12
1	Pragmatism		2,3,9,13												
2	Empathy	1	18,3,9,13												
3	Purpose	1,2	4,5,18,11,13,16												
4	Aspiration	3	6,11,13,16												
5	Coherence	3	6,14,15,7,12,11,13												
6	Wisdom	5,4	8,12,13,16												
7	Openness	5	18,9,10,17												
8	Discernment	6	9,13,10,16												
9	Clarity	1,2,7,8	18,11,13												
10	Accountability	7,8	14,15,18,12,13,16,												
11	Prudence	5,4,3,9	13												
12	Usefulness	5,6,10	14,15,18,13,16												
13	Integrity	4,5,6,1,2,3,8,12,9,11,10	14,15,18,16												
14	Privacy	5,12,13,10	18												
15	Freedom	5,12,13,10	18												
16	Responsibility	6,5,4,3,8,12,13,10	18,17												
17	Empowerment	7,10,16	18												
18	Appreciation	14,15,2,3,7,12,9,13,10,16,17													

Figure 1: Values suggest a sequence that may be the secret to PMI's next CEO achieving an unprecedented transformation.

Why is the matter existential, and why is clearly making a trade-off decision so important? Answers can be found in "The Rule of Three," a book by the widely esteemed Jagdish Sheth (who was one of my professors at Emory's Goizueta Business School before I graduated and joined the faculty as both alumnus and adjunct). A key message of this classic from Sheth and his co-author Rajendra Sisodia is that market specialists consistently destroy themselves if or when they try to evolve into "full-line generalists." The company falls into what Sheth and Sisodia call "*the ditch*," per Figure 2.
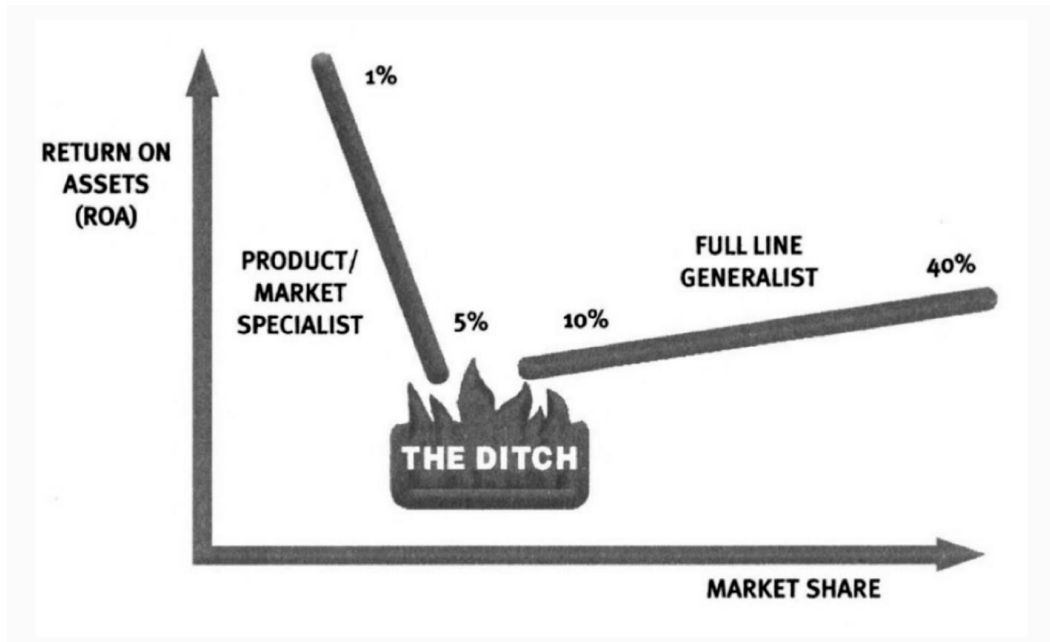

Figure 2: As PMI is lured away from its specialization of focusing on standards, certifications, conferences, networking events, and educational materials toward expanding professional services, it risks falling into the ditch.

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I recently met with Professor Sheth and asked how he would apply the "Rule of Three" to PMI. He responded "PMI is a market specialist. So long as PMI keeps the individual members as the market segment it serves, PMI can add more services that target the future needs of those members. The idea is to gain more share of wallet from its target market (namely the practitioners of project management) and to increase PMI's stickiness." Per Sheth, who was recently lauded as one of India's foremost thinkers on competitive strategy by the Prime Minister of India, where project management is poised to grow more explosively than anywhere else on Earth, PMI's winning strategy would be to focus on PMI members (project managers) and how to get members to stick to PMI for successive customer intimacy. One would do so by helping project managers demonstrate their professionalism, not by providing undifferentiated professional services to their bosses, other executives, or organizations writ large. *Persistent disagreements about these things amongst parties in every part of PMI's ecosystem present a problem as* gnarly as the knot greeting Alexander on his way to glory. We should "cut" to the chase by taking a reflective and realistic view, having a positive attitude, confirming shared values, and co-creating the best version of PMI for the future of the profession. That starts by looking in the mirror.

Pragmatism

As a practical matter to enable a constructive discourse about issues and solutions, I have removed from this article the names and personal details of anyone whom I have perceived as responsible for a decision by PMI that I have challenged. I do not question the intelligence, competence, or integrity of any PMI employees or PMI at large. I have offered arguments and their counter-arguments. If the reader believes the result leaves out anything salient which would lead to different conclusions or is unfair to parties on either side of a debate, he or she should let me know so the article can be corrected or improved. To craft the most compelling yet constructive account of reality, I have spent months writing and rewriting this story, repeatedly engaging a global brain trust of thought leaders in the process, displaying my multitudinous imperfections in each iteration, and relentlessly subjecting my ideas and words to the purifying rituals of criticism. The aftermath is both my story and the story of countless others.

Having said that, I realize readers would be hard pressed to believe the twists and turns of this yarn if I were unable to show that I know this story because I was involved in each skein as it unraveled. I guess you could say *I have skein in the game*, if you'll excuse the pun. In the spirit of pragmatism, I have taken liberties by writing from a personal perspective that emphasizes my own involvement in plain language not because I think anyone should care about my own part in this story but because first-hand details communicated accessibly are necessary to demonstrate authenticity. *It would be impossible for readers to appreciate the variety of important questions various stakeholder groups have about where PMI is heading (and therefore impossible to appreciate suggestions for PMI's leaders) without a compelling description of the events I shall describe.* It is "my truth," and others will have their own truths, which is a way of saying that this article is not just about the facts: it is about what respective parties have made facts mean. We can be sure everyone involved in any aspect of these events experienced them in their own ways. Different views of the same events are natural, as anybody who's been married knows. Some people will derive congruent meanings from the facts and agree with each other. Other people won't, and that's OK. Intelligent people often disagree, and I believe that disagreement is healthy, that one should *keep an open mind,* scanning for opportunities to reveal another's conception of events *as if walking through a door to another reality.* It is critically important to listen to those

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with whom one disagrees, to allow straight talk, and to do so without creating fear of reprisals. *We are endowed with intent, and empathy unlocks power.* I am well known for believing these things and acting accordingly, and though I speak to you as myself, I speak for many: the disenchanted ones who have no words, the wonted ones who have no voice, and the hopeful ones who dream what is possible (per Appendix A).

> "I speak for many others."

Articulating values without a clear context for corresponding behaviors is a waste of time. In what follows (Parts 2 through 5), I will elaborate a context, explaining the backstory to each value, which PMI's leaders and stakeholders can critique and discuss to dismantle conflicts, cultivate alignment, and co-create the future. Some of PMI's most celebrated and long-standing advocates have lauded my efforts to introduce strategic distinctions helpful to PMI's members, PMI's leadership team, PMI's Board of Directors, and PMI's incoming CEO. A key takeaway for leaders: the more you validate the act of speaking up, the more people will speak up. There's a huge upside to raising voices, which is an essential element of the solution to issues that have plagued PMI. Greater diversity of thought can lead to less-biased decision-making and greater collective intelligence, and it can cancel out the downsides of power imbalances. One of PMI's leaders recently said this article "should be required reading for the new CEO." Though I doubt PMI's new CEO needs me to explain how to keep PMI out of a ditch, I do know that by formulating reality through the lens of **pragmatism** and articulating what others have made events mean is how the mind creates opportunities for **empathy**.

> "Empathy can lead to smoother, simpler relationships, success, and happiness."

Empathy

The source of conflicts is often expectations that don't match reality. We expect one thing, but something else happens, and upsets ensue. The disagreement often begins unconsciously. A revolutionary and now widely accepted theory called "predictive mind" explains that automatic processes of the mind play a central role in our lives. "Many people stubbornly cling to the old distinction between the instinctive unconscious and rational consciousness, with a preference for the latter," wrote Steve Ayan in Scientific American, "but this view is untenable." We are actually running on auto-pilot most of the time. When things do not go as predicted, they cause us to become conscious of circumstances that merit our attention, which enables us to avoid the pitfalls of automatic processing and adjust to changes in our environment. I suggest that disagreements can serve a similarly constructive function, jarring us awake and causing us to consider each other. We can benefit from an *episode* like that by learning to create *empathy*. A disagreement or *empathy* episode can help us to become more conscious, collaborative, and capable. An episode of *empathy* can lead to smoother, simpler relationships, success, and happiness.

Per Harvard Business School's Novartis Professor of Leadership and Management Amy C. Edmondson, leaders who are serious about success in the modern economy must create *fearless organizations,* because **creating** psychological **safety** for individuals to express dissent **is essential to success** in the knowledge economy. She wrote, "What good does having access to talent do if no one is able to speak their mind? The traditional culture of 'fitting in' and 'going along' spells doom in the knowledge economy. Success requires a continuous influx of new ideas,

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new challenges, and critical thought, and the interpersonal climate must not suppress, silence, ridicule or intimidate." In *Dare to Lead*, Brene Brown wrote "Leaders must either invest a reasonable amount of time attending to fears and feelings or squander an unreasonable amount of time trying to manage ineffective and unproductive behavior." It is not just a practical matter of succeeding in today's business landscape: it's how leaders create virtuous organizations. "Courage," wrote Aristotle, "is the first virtue that makes all other virtues possible." If I were PMI's next CEO, I would make this my top priority. As Peter Drucker used to say, "Culture eats strategy for breakfast."

Appendix A: Statements about John Schlichter from Team

"**John Schlichter's leadership and vision** on a massive undertaking of the OPM3 initiative **was exemplary and a true testament of his passion for the project management profession**."

— **Dr. Ashley Pereira**, *Senior Engineering Manager & Six Sigma BlackBelt, Honeywell Aerospace*, was with another company when working with John at Project Management Institute

"John directed the original team that developed OPM3 for PMI, and I was the technical writer on the team. John demonstrated remarkable talents in this position, which I observed over several months. **He is a brilliant strategist**, **a strong, decisive leader, and a creative, visionary thinker in his field.**"

— **Paul Wesman**, *Owner, Wesman Corporate Communications*, worked directly with John at Project Management Institute

"John was a detail oriented and very focused Director for PMI's OPM3 Product Development Initiative. ...**John is brilliant**; he was highly intelligent; kept track of all details and high level management and reporting; very focused and hard working."

— **Cynthia (Cindy) Berg, PMP**, *Volunteer/Member, Project Management Institute*, managed John indirectly at Project Management Institute

"**John demonstrated great leadership and visionary foresight** as Program Manager of PMI's OPM3 development effort. Very knowledgeable of our specific subject-matter, **John was able to motivate and inspire all of us to work towards our common objective**. **He was able to adeptly address specific issues at a granular, detail level, while at the same time not losing sight of our overall objective.**"

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— **Nik Kalantjakos**, *OPM3 Assessment Team Leader, Project Management Institute*, reported to John at Project Management Institute

"OPM3 was a very complex program and involved volunteers from a variety of companies and industries in varying degrees of maturity. Under John's leadership, I served for two years as a contributor. To his credit, **John was able to inspire, motivate and guide a large group into some of the most uncharted waters of the project management profession**. **I was most impressed with John's ability to listen, especially when you disagreed with him; he always gave a fair hearing**. Without question, such **integrity deserves respect** and my recommendation."

— **Michael Paul Ervick**, *Project Manager (PMO Staff), Nextlink*, reported to John at Project Management Institute

"**John has result oriented approach with open mind for ideas and out-of-box suggestions**. **His leadership is helpful to explore resolution to any issue of business challenges**. **Work with him on complex problems is highly enjoyable**."

— **Muhammad Mirza**, *President-PMI KPC, Project Management Institute*, reported to John at Project Management Institute

"I worked with John as a member of his team to create the OPM3 standard of PMI. **John was equally open to analyze all inputs or suggestions coming from all the parts of the world** in a virtual team of about 200 people. It was a challenge and I am sure that **thanks to John all team members are very positive about this experience.**"

— **Thierry Soulard**, *Program Manager, Philips semiconductors*, was with another company when working with John at Project Management Institute

"I worked with John on the OPM3 initiative at PMI and enjoyed his leadership. As Program Manager, John followed up with team members to ensure the project stayed on track and was meeting/**exceeding expectations**. **He respected the inputs from the team members and recognized the contribution of each one**. I would welcome the opportunity to work with John on another project."

— **Yves Racine**, *President, Project Management Maturity Improvement Inc.*, worked directly with John at Project Management Institute

"Around 2000- 2002 I worked as a volunteer with many others on the Organisational Project Management Maturity Model (OPM3) being developed as a Project Management Institute

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project. John was director of this programme. **His enthusiasm and approachability helped inspire** a large team of us for **every corner of the globe**."

— **Peter Goldsbury**, _Owner, Strategic Expertise Ltd_, worked indirectly for John at Project Management Institute

"I was fortunate to work for John when the Project Management Institute was developing OPM3. **John was** a **brilliant** Project Manager **leading a worldwide team** of PM's to develop a coherent, measurable Maturity Model around Project Management comparable to CMMI. This was **a bold undertaking** with a long list of challenges, but John was up to the task and produced **an excellent product**."

— **George Kramer**, _Sr. IT Project Manager, Lockheed Martin Aeronautics_, was with another company when working with John at Project Management Institute

"I worked with John during his initial tenure as lead for the Project Management Institute's effort to develop its Organizational Project Management Maturity Model standard. **His commitment and drive were significant** contributors to the success of this effort. **He demonstrated strong leadership skills** in **keeping a very diverse group** of volunteers **focused on creating a finished product that would benefit the project management community**."

— **David Violette**, _Project Manager, Duke Energy Corporation_, worked directly with John at Project Management Institute

"I worked on the development of the Organizational Project Management Maturity Model (OPM3) for PMI, having John as **the leader of a global team** of project management experts as the overall Program Manager and subject matter expert. **John did an excellent job building the team and managing to keep focused a diverse group of people. He is a proactive leader, truly an asset to every organization**."

— **Mauro Sotille, MBA, PMP**, _President, PMI-RS Chapter_, worked indirectly for John at Project Management Institute

"I worked with John on the OPM3 Standards project sponsored by the PMI where **h**e led a global team of project management experts as the overall Program Manager and **the original architect of the organizational project management maturity model. John is a tremendous subject matter expert on Organizational Project Management**, process improvement, and organizational development arena. **He is a fantastic leader**, and I learned a lot from him working on this **ground breaking** project and recommend him without any hesitations!"

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— **Lutfur Rabbani***, Co-Lead of OPM3 Network Model, PMI - OPM3 Program*, worked with John at Project Management Institute

"John was our first Leader of the OPM3. This was a new maturity model for Project Management initiated by PMI and John had the task of driving it. I was a Risk Management team member then, and **I was amazed at his organizational and coordination skills leading a global program**. **It also demonstrated his knowledge of this new subject then, and his ability to build a team, share the thought process and work with the global team**."

— **Vivek Dixit***, Voluntary work -- Knowledge Management, PMI (Project Management Institute)*, worked directly with John at Project Management Institute

"As PMI's Program Manager for OPM3, **John led the program and motivated** the various sub- project teams while simultaneously sharing subject matter **expertise on managing the interaction and relationships of an organizations projects, programs, and portfolios.**"

— **David Evenson***, Project Mgr Sr/Programme Mgr, EDS*, worked indirectly for John at Project Management Institute

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Appendix B: An Attempt to Define Values that Address the Issues

The following is merely the author's first attempt to codify suggestions in a positive way that is helpful albeit flawed. It simply serves as a basis for discussion of ways to articulate values that PMI's leaders may find constructive.

- **Aspiration**: PMI aspires to create a project management profession recognized globally as an indispensable practice for solving problems at all scales to meet the exponential future accelerating toward us. We believe the trade and field of project management becomes a profession through standards of technical capability and ethical action. Certifying people in those standards based on their knowledge, competence, and integrity to solve problems at all scales in an ethical manner inures to the benefit of both project management practitioners and project stakeholders alike.

- **Purpose**: we create the possibility of a purpose-driven PMI organization by distinguishing the *institute* of project management from the *institution* of project management. The latter is the integration of project management practices throughout society based on project management capabilities perceived correctly as legitimate ways to solve problems ethically, successfully, consistently, and predictably. The purpose of PMI is to promote the institutionalization of project management through standards and certifications in those standards.

- **Pragmatism**: we create the possibility of pragmatism by recognizing that keeping an open mind and listening to others is vital, that people can disagree reasonably, and that straight talk without fear of reprisals is critical to PMI's success. Greater diversity of thought leads to less biased decision-making and greater collective intelligence. Conflicts are dismantled by helping individuals distinguish what happened from what they made it mean. Intentionally cultivating empathy and alignment has practical value that makes PMI more powerful and therefore more capable to achieve its purpose in pursuit of its aspirations.

- **Empathy**: we create the possibility of empathy by creating an interpersonal climate that encourages a continuous influx of new ideas, new challenges, and critical thought. For that reason, we do not suppress, silence, ridicule, or intimidate PMI's employees, members, or stakeholders. We believe courageous leaders create fearlessly virtuous organizations. Empathy is how we prioritize values, rally believers, identify and dismantle fears, and enroll stakeholders to commit to our purpose.

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- **Coherence**: we create the possibility of the coherence of PMI's purpose and aspirations by helping PMI's employees and members to engage in constructive debate about what they feel PMI can do versus what they feel PMI should do. Leaders at every level of PMI's management hierarchy must be able to make this distinction individually, free from manipulation, suppression, ridicule, or intimidation.

- **Wisdom** – we create the possibility of practical wisdom by encouraging public discourse among PMI's employees, volunteers, and stakeholders regarding the following questions: 1. Where are we going? 2. Who gains and who loses, and by which mechanisms of power? 3. Is this development desirable? 4. What, if anything, should we do about it?

- **Discernment** – we create the possibility of discernment by cultivating practical wisdom. We believe that by engaging in public discourse about practical wisdom, we cultivate empathy and alignment regarding PMI's purpose, values, and aspirations.

- **Clarity** – we create the possibility of clarity through discernment based on pragmatism, empathy, and openness.

- **Responsibility** - we create the possibility of responsibility by creating leaders who are capable of discerning practical wisdom, demonstrating accountability, and maintaining integrity based on the coherence of PMI's purpose and aspirations.

- **Accountability**: we create the possibility of accountability by subjecting our leaders to the obligation to report, explain, and justify their actions. We believe that accountability is essential to trust, that trust is essential to empowerment, that empowerment is essential to effective collaboration, that collaboration requires diversity assured by the accountability we require of our leaders. These are essential to solving the problems and improving the systems intrinsic to institutionalizing project management throughout society.

- **Empowerment**: we create the possibility of empowering PMI's employees and volunteers by establishing trust. We believe in pushing power to the edge by authorizing the people closest to issues and systems to resolve and improve them. We believe PMI's effectiveness stems from the self-synchronization of employees and volunteers based on shared awareness and shared intent. We encourage the transparent sharing of information among PMI's employees, members, and stakeholders to create effective collaboration based on trust.

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- **Usefulness**: we create the possibility of usefulness by understanding stakeholder needs and empowering PMI's employees and volunteers to address stakeholder needs through the creation of knowledge codified as standards that predicate certifications. We believe that what is useful to PMI's stakeholders and what is useful to PMI are often the same but that differences arise in views about these things. We arbitrate those differences through accountability to our values.

- **Privacy**: we create the possibility of privacy for all of PMI's stakeholders by cherishing it because privacy prevents individualism, diversity, and freedom from being reduced to conformity, sameness, and tyranny. This is central to PMI's purpose of enabling the voluntary association of individuals who rely on project management professionalism.

- **Freedom**: we create the possibility of enabling individuals and companies to associate with each other freely and to cooperate with each other in a community based on technical standards and ethical standards. We encourage the freedom of PMI's stakeholders to use PMI standards however they wish. We encourage the freedom of PMI's stakeholders to change PMI's standards to suit their own needs. We encourage the freedom of PMI's stakeholders to copy, modify, and distribute standards at no charge. PMI will not prioritize commercialism over these freedoms.

- **Prudence** – we create the possibility of prudence by establishing our values as the basis of coherence between our capabilities and our aspirations. We believe this is fundamental to PMI's integrity, which relies on clarity regarding what is included in PMI's scope but more importantly clarity regarding what is excluded and why. PMI's purposes and aspirations must always be governed by PMI's values.

- **Integrity**: we create the possibility of integrity by articulating our values clearly and ensuring our words and actions are consistent with our values. We believe PMI's employees and PMI's members form a whole greater than the sum of its parts and stronger through unity in diversity. We value goodwill more than revenue, people more than profits, and freedom more than control. Above all else, we value transforming the field of project management into the profession of project management. Our words and actions match these values by encouraging the free association of individuals through standards distributed without charge and without constraints.

- **Openness** – we create the possibility of openness by maintaining coherence and integrity between PMI's purpose, actions, and aspirations in the spirit of usefulness and prudence. By maintaining these, PMI's employees can collaborate effectively with volunteers and

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stakeholders in ways that empower the influx of ideas and critical thinking without exposing PMI employees to harm.

• **Appreciation** – we create the possibility of appreciation by cultivating empathy, openness, clarity, accountability, and responsibility for achieving usefulness in ways that embody our purpose with integrity.

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Appendix C: Resources for Phronesis

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About the Author

John Schlichter

Atlanta, GA, USA

John Schlichter coined the term "Organizational Project Management" or "OPM," which is the system for implementing the business strategy of an organization through projects. OPM became a global standard and is how companies throughout the world deliver projects valued in billions if not trillions of dollars. "John has contributed greatly to PMI," Greg Balestrero, CEO, PMI Today, 2002. "In John's role as the leader of PMI's OPM3 program, he has immeasurably contributed to the growth of the profession," Becky Winston, J.D., Chair of the Board of Directors, PMI Today, 2002. Having created OPM3© (an international standard in project, program, and portfolio management), John founded OPM Experts LLC, a firm delivering OPM solutions and a leading provider of maturity assessment services. Industry classifications: NAICS 541618 Other Management Consulting and NAICS 611430 Training. John is a member of the adjunct faculty of Emory University's Goizueta Business School.

John can be contacted at jschlichter@opmexperts.com or frank.john.schlichter.iii@emory.edu.

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