

Alexander and the Indian King - Part 2¹

John Schlichter

By some estimates, the sum of all human knowledge is doubling every twelve hours. The pace of technological change is perpetually redefining human-technology relations to such an extent that every leader inherits an identity crisis as soon as he is collected to any organization anew. In this context, it is not only natural but necessary for PMI's incoming CEO to face the question: "What is PMI?" Is it a developer of technology? An architect of abstractions? While PMI may be many things in the minds of many people, what is it *essentially*? What structures and functions are indispensable to PMI's meaning? In much the same way one might ask "What makes a horse a horse?" PMI's CEO must ask "What makes PMI whatever it is?" After everything PMI *could be* is removed, and nothing more can be removed without losing what it means for PMI to be PMI, what remains? *PMI should cleave from itself and terminate all entrepreneurial endeavors that other companies can do and re-focus all its energy on revolutionizing those things which only the premiere trade association for the profession of project management can do.*

The one interest common to all stakeholders of project management is for projects to be successful. Toward that one common goal, all stakeholders want project management to be not only a field of activity but a profession. The field of project management cannot become the profession of project management unless the practitioners subscribing to the profession are widely perceived as adhering capably to standards. Although trade organizations may obtain many structures (e.g. a non-profit organization, a federation, a network), the preferred structure is whichever one facilitates most efficiently and sustainably transformation of the field to the profession by enrolling a critical mass of adherents to a shared vision based on shared values.

To reiterate a predicate from Part 1, some people perceive PMI's values in such a way that they 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, certifications that denote competence in those standards, conferences pertaining to all aspects of projects, networking events that help project management practitioners associate with each other globally, and educational materials that increase knowledge regarding all aspects of project management. This view prioritizes institutionalizing project management in society.

Alternatively, others perceive PMI's values in such a way that they 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. That view prioritizes scaling the institute. 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? By offering professional services, does PMI undermine itself?

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Aspiration

Consider what is at stake. Projects dominate our world, whether the [Human Genome Project](#) or humanitarian projects in [Sudan](#) or [Syria](#), projects to create everything from [new information security platforms](#) to [new mobile phones](#) and [futuristic technologies](#); projects that deploy [technology infrastructures](#) or [urban infrastructures](#), projects that [consolidate businesses](#) or [expand businesses](#), and projects that improve all manner of [processes](#), [systems](#), and [cultures](#). When project managers mismanage projects, damages occur. The scale of damages from poorly managed projects is enormous, whether that is due to any given [mega-project](#) that costs billions of dollars in overruns or countless smaller projects with smaller failures in organizations of every kind across the globe that, in the aggregate, eclipse individual mega-failures. By creating technical and ethical standards which [distinguish good practices from bad](#) and helping people to be certified in these, we can help both the persons who are certified and their stakeholders gain a confidence that has real value. We can also discourage bad or irresponsible practices. Every essential trade recapitulates these principles toward institutionalization as an intrinsic telos inured to the benefit of society.

If a professional association prioritizes commercialism and becomes a competitor to commercial organizations of the field, it degrades its legitimacy and therefore its ability to perform the role of defining standards that distinguish what is professional from what is not. Why do you think baseball umpires are prohibited from owning a baseball team governed by the standards they arbitrate, much less prohibited from betting on teams? PMI cannot be the arbiter of any standard of *ethics*, for example, if it has a vested interest in competing against others governed by that standard, no matter how one structures UBTI. It must choose to be one or the other, the advocate or the player. If it chooses to be the advocate, it must recuse itself from being a player.

Rumors abound that PMI has refreshed its strategy (in something called *PMI 2.0*) to resume its original mantle: the mission PMI had when it was first formed in 1969 — service and support for project management practitioners. In pursuit of the institutionalism of project management as an indispensable and implicit practice for solving problems at all scales, will PMI aspire to elevate project management as a discipline on par with medicine and law? Or in pursuit of the Project Management Institute's growth and revenue goals, will PMI weave its way through every stage of the value chain associated with professional services that enable strategy implementation through projects, vertically integrating one stage after another in an inexorably totalizing drive to commercialize the full line? Whether one path is righteous and the other is reprobate in anyone's eyes will depend on what that person makes "service and support for project management practitioners" mean. For example, in what appears to some to be a contravention of the rumored refresh, PMI appears to be going down the latter path of commercializing professional services vis-a-vis a marketing campaign called the *Brightline Initiative*, which is marketing assessments and capability development offerings that pit PMI against any other company offering similar services.

I offer the following hyperbole for readers to take with a grain of salt, hoping that it helps make a useful distinction. After PMI strategy design training, after PMI maturity assessment services for organizations, and after PMI capability development offerings to help organizations develop capabilities, what's next? PMI recruiting and placement? PMI productivity and workplace communication technologies? PMI project management software? PMI PPM tools? PMI business

process outsourcing? PMI accounting, financial planning, investment management, or actuarial services? A PMI bank or a PMI law firm? How about artificial intelligence, which is all the rage these days? PMI could make AI products for each and every one of these things: an AI for strategy design, an AI for maturity assessments, an AI for capability development, an AI for recruiting and placement, an AI for productivity and workplace communications, an AI for project management software and PPM tools, an AI for business process outsourcing, an AI for accounting and financial planning and investment management, an AI for actuarial services, an AI for all the project managers' banking needs, an AI for all the project managers' legal needs... And how about an AI companion to give lonely project managers a virtual hug when the going gets rough? An AI Buddy from PMI that can help you get through the day! While we're at it, let's start that day right. How about *PMI cereal* for a hearty breakfast? Project managers need to eat breakfast, right? Picture it: a never-ending PMI conglomerate with PMI vitamins and workout videos, PMI time-shares and reverse mortgages, PMI chat bots and robots. In that prospective plot, it is only a matter of time before the people served by this entrepreneurialism are eclipsed by a cataclysm of competitive forces pitting PMI against behemoths like Amazon or gargantua like Google (two leaders in artificial intelligence) in ways reminiscent of [Oliver Twist and his master](#). PMI serves three million customers compared to Amazon's three hundred and ten million and Google's cool billion.

I imagine most people would agree this Tower-of-Babel scenario is preposterous, but how preposterous exactly? Everyone probably agrees that cereal and workout videos or time-shares and reverse mortgages are a bridge too far. But read the list of possibilities backwards and see where you draw the line. As we approach the second decade of the 21st century, AI-ambitions can awaken anyone's inner Alexander in ways that would put the globalists of Davos to shame. It is instructive: different people have different views about what PMI's scope of operations should be, which is a situation crying out for clarity and alignment. I would argue that each step PMI takes *beyond* creation and arbitration of technical and ethical standards to support project managers in their pursuit of professionalism degrades PMI's legitimacy and therefore its ability to transform the field of project management into a profession. That includes all forms of commercialism rationalized as service and support for project managers. Is PMI a business, or is it the creator of the profession that defines the future of work? This is the strategic question facing PMI's new CEO.

Freedom

If PMI's most noble aspiration is institutionalization of project management through creation and elevation of the profession of project management, then creating and arbitrating technical standards and ethical standards that enable free association is PMI's highest good. That is why PMI must not reduce standards development to a commercial endeavor. It must value freedom more than commercialism.

“If our fundamental freedoms do not guide standards development then it is not development. It is colonization.”

Leaders instantiate standards uniquely all the time, specifying which of their own resources correspond to different parts of a standard and the aspects of performance that are most important to them, decisions which may differ one organization to the next. Standards create the possibility of behavior governed by higher organizing principles but independent in detail. To grasp what standards are

conceptually, consider the example of *roads*, which became de facto standards as the way travel occurred, real standards by fact of use, i.e. the first level of standards as prevailing practices, which may hide important details, differences, or contingency variables that only emerge later. In terms of roads, tacit knowledge of paths is translated into explicit knowledge, e.g. maps that codify popular routes, i.e. the second level of standards as paradigms or frameworks whose authority is asserted, though one person may use a map one way and another person another way. Standard practices of traveling are accompanied by rules or standards de jure (that is, officially or by law), e.g. weights, measures, coinage, i.e. the third level of standards as abstractions contrived to enable interaction (without necessarily dictating what those interactions shall be). Standards must be allowed to evolve at each of these three levels through practical use and experience, answering the question "Does this work?" The question is recursive, and standards evolve constructively without compromising value by maintaining historicity and traceability.

What makes the evolution of standards at each of these three levels capable is widespread use and vetting of the standards. To enable that, a professional association must promote the following four freedoms:

- the freedom to use the standards however you wish
- the freedom to help yourself, i.e. the freedom to study the source materials of standards and change the standards to do what you wish
- the freedom to help your neighbor, i.e. the freedom to copy the standard and distribute copies to others when you wish
- the freedom to help your community, i.e. the freedom to publish or distribute a modified version when you wish

To paraphrase Richard Stallman, if our fundamental freedoms do not guide standards development then “it is not development. It is colonization.” When our freedoms are compromised by a professional association due to commercial interests, the association risks questions of legitimacy that can prevent the field from being perceived as a legitimate profession. When commercial interests take priority, a professional association becomes something altogether different that naturally develops quasi-monopolistic characteristics, i.e. something less like the American Medical Association or the American Bar Association and more like a profit-driven corporation. Reporting on themes of 2018’s Drucker Forum, Steve Denning summarized that, for many leading companies, “their very success has turned some of them into quasi-

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monopolies, giving rise to the risks that monopoly always brings. The <manipulation of workers> and issues of privacy and exploitation of personal data are also present in some cases. In other cases, there are steps backward after steps forward.” Is PMI becoming a quasi-monopoly? Do volunteers working on PMI’s behalf feel they have been manipulated? Has the commercialization of PMI standards resulted in privacy issues or the risk that personal data could be exploited? Is PMI’s Brightline Initiative a step backward after PMI’s so-called “strategy refresh” was a step forward? Have commercial interests thwarted the four essential freedoms for standards development? What are the implications for transforming the field of project management into the profession of project management?

Coherence

Our six *empathy* episodes begin with an anecdote in which I fell through the air, my life flashing before my eyes. Up until the turn of the century, PMI viewed elaborating and promoting the management of individual projects as an end unto itself. Recruited by PMI to develop industry standards, I responded to the 1998 Standard’s Committee’s interest in developing standards for *organizations*, standards that they hoped would help organizations deliver successful projects more frequently. My first assignment was to analyze the viability of creating a project management *maturity model* for organizations; I wrote a report for the Standards Committee titled “[Organizational Project Management Maturity Model Deliberations](#)” and presented it on August 15, 1998 before heading to an amusement park to ride a roller coaster, which one might say foreshadowed the crazy ride ahead for OPM3. I nearly dislocated my jaw emitting a scream I am not proud of on the 5th tallest roller coaster in the world after my cohorts talked me into an adventure they clearly knew more about than I did (Figure 3).

“I fell through the air, my life flashing before my eyes.”

Hours before I plummeted 207 feet to Earth on the Wild Thing, I had proposed to PMI’s Standards Committee that the OPM model should help organizations *implement their strategies* through projects, not merely promote project success. I argued that a standard for organizations should help organizations accomplish their goals, that organizations implement strategies through projects systematically, and that this system, which I coined “Organizational Project Management,” could be made [capable](#). I named it “OPM” simply to distinguish it from the management of individual projects that are temporary endeavors, emphasizing the link between an enduring organization’s goals and the goals of an organization’s many temporary endeavors. Paul Dinsmore encouraged me to keep the name “OPM” for the emerging standard, perhaps because he wanted to distinguish his own [book](#) on the subject, which he described as Enterprise Project Management (EPM), in which he described “managing organizations by projects (MOBP).” At a subsequent meeting, the team endorsed my observation that OPM integrated project management, program management, and portfolio management in virtually every kind of organization structure, and that OPM could be implemented in any organization that was a goal-directed entity, including any subset of a larger organization, such that OPM did not require enterprise (or enterprise wide) project management (EPM). The naming was fortunate insofar as the term “organization” is appropriate for the manifold structures that such systems obtain, and these distinctions (the integration of project, program, and portfolio management to implement strategy) were formally approved as essential principles of an OPM standard. I was invited to PMI

HQ for a budget request meeting and recommended to PMI's CEO Virgil R. Carter that PMI should embark on this new trajectory, which concluded by Virgil approving the request for funding to develop PMI standards reflecting this idea.



“Marketing the concept of strategy-implementation-through-projects (OPM) soon became PMI’s dominant logic.”

Figure 3: After I proposed OPM3, several PMI Standards Committee members went to the Valleyfair Amusement Park. Clockwise from lower left: me (PMI OPM3 Program Director), Cindy Berg (PMI Person of the Year), Debbie O’Bray (PMI Board Member and PMI Fellow), and Bill Duncan (PMI Director of Standards).

“An organization’s dominant logic binds one’s techno-economic views about instrumentality (means and ends) with one’s normative views about the purpose, legitimacy, and morality of one’s actions.”

PMI correctly pivoted to “strategy implementation through projects” (OPM) as its new paradigm, identifying the purpose of projects as more than the means to achieve project goals and instead as the means to realize organizational strategies, which was reflected in PMI’s new tagline “Making project management indispensable for business results.” Marketing the concept of strategy-implementation-through-projects (OPM) soon became PMI’s dominant “logic.” *Did this logic become an inexorably totalizing drive to commercialize every stage of the value chain associated with professional services that enable strategy implementation through projects?* Strategy Professor Robert Kazanjian (who was one of my former professors at Emory’s Goizueta Business School before I joined Goizueta’s adjunct faculty), defined organizational logic as the “underlying cognitive glue” encoded into the minds of organizational actors who create institutions. As Kazanjian has explained with co-

authors Robert Drazin and Mary Ann Glynn in the *Oxford Handbook of Organizational Change and Innovation*, an organization’s logic binds one’s techno-economic views about instrumentality (means and ends) with one’s normative views about the purpose, legitimacy, and morality of one’s actions. This raises important questions in my mind. Does an organization’s dominant logic (or the coherence of perceptions regarding an organization’s actions and perceptions regarding the

organization's purpose, legitimacy, and morality) dictate its ability to develop practical virtue in terms of value rationality and praxis? In other words, does the rationalization of what we can do versus what we should do determine how capably an organization's actors cultivate practical virtue? For example, if an organization's leaders believe in winning at any cost, will constituents reflect that in their actions by deciding, for example, that the organization is either "charitable" toward its stakeholders or, conversely, "less sympathetic" toward them? Foucault has argued that social categories must exist for individuals to perform the actions that prescribe to either category to which they identify. Do you think leaders give their adherents contextual [cues](#) that create meaning out of the ways they exercise [power](#)? Do you think the ways leaders exercise power either encourage or discourage adherents to pursue practical virtue? Oxford's Bent Flyvbjerg argues that we can encourage the cultivation of practical virtue (phronesis) simply by asking 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? See Appendix C for resources.

Promoting the concept of *strategy implementation through projects* (OPM) became both a mission and a cause for PMI's agents, playing out over subsequent years in consequences that were often unintentional and occasionally pathological. It began nearly 20 years ago with the creation of the foundational standard, which was created by PMI volunteers and named the "Organizational Project Management Maturity Model" or "OPM3®." It was a *Capability Maturity Model* (CMM) designed to help users assess and improve the *capabilities* necessary for organizations to implement an organization's strategies through projects. After the PMBOK Guide, OPM3 was PMI's second *foundational* standard, and drove the creation of the Standard for Program Management and the Standard for Portfolio Management, which were the third and fourth of PMI's four *foundational* standards. The PMBOK Guide (which elaborated the management of an individual project), the Standard for Program Management (which elaborated the management of groups of projects together for benefit realization), and the Standard for Portfolio Management (which elaborated the management of portfolios through selection and management of projects and programs) represent three interlocking subsystems that reflect OPM3's three domains. Incidentally, that is not what the numeral "3" denotes. Contrary to popular belief, when I first created the acronym "OPM3," I did not abbreviate "Organizational Project Management Maturity Model" as "OPM3" to denote OPM's three domains. I did it simply because it was easier to say "OPM3" than "OPMMM." Over the years, it's been amusing to see this convenience produce one isomorphism after another as others created similar models which always incorporate the number three in their names, e.g. the UK Office of Government Commerce's P3M3.

"I suggest that an organization's dominant logic dictates its capability for practical virtue in terms of value rationality and praxis, i.e. phronesis."

OPM3 was designed to help organizations implement their strategies through projects no matter what an organization's strategies were or how those strategies were formulated. Helping organizations to assess and improve *strategy design* capabilities was *outside the scope of PMI's mission*. As a *Capability Maturity Model*, OPM3 focused instead on integrating portfolio, program, and project management via *Capability Statements* that articulated specific capabilities one would assess and develop in one's organization to implement strategies through projects successfully, consistently, and predictably.

Empowerment

Empathy episode #1: Just as disagreements often begin unconsciously, actions often have unintended consequences. The original fragmentation of OPM3 did not seem to me to be the result of any commercial objectives on the part of PMI's executives, but it may have been the result of a failure on the part of PMI's executives to empower the original leaders of the OPM3 Program to deliver their research based product in the manner it was designed, built, and tested to work, which inadvertently created the conditions necessary for OPM3's subsequent commercialization, which occurred the way it did precisely because of the incredible way OPM3 was fragmented.

Around 2003, PMI decided that users did not need the OPM3 Capability Statements to perform OPM3 assessments, which was like saying you don't need apples to make apple pie. The fact that OPM3 was a *Capability Maturity Model (CMM)* should suggest the problem. This was the lynch pin in PMI's flagship standard embodying PMI's new dominant logic. The OPM3 Capability Statements were the specific statements of capability that described what organizations should do to implement Organizational Project Management (the system for implementing an organization's strategies through projects) and what they should do to increase maturity in OPM. Each OPM3 Capability Statement defined the corresponding outcomes for that capability and key performance indicators (KPI's) for those outcomes. Every single Capability Statement was defined in terms of all other Capability Statements that were its predecessors and successors.

“Saying you don't need the OPM3 Capability Statements to implement OPM3 is like saying you don't need apples to make apple pie.”

An intentional byproduct of creating such a model was that these Capability Statements could be used to assess an organization's maturity level in such detail that assessments were highly actionable. To be clear, the Capability Statements were the standard (based on extensive primary research that identified *de facto* practices in organizations of all kinds), and the assessment protocol emerged naturally from it, much like a college curriculum is a model of education based on proven practices that a grading rubric emerges from. In other words, the Capability Statements were not only the most essential aspect of OPM3; they were also the key to undertaking maturity assessments and making improvements that enable organizations to implement their strategies through projects. But PMI decided this highly researched structure endorsed by the entire OPM3 Program management team and hundreds of other people could, should, and would be reduced to a handful of [questions](#), which PMI asserted was a perfectly effective way to perform OPM3 assessments. *To empathize with PMI, I assume they did this because they thought it would simplify things for users, whom they probably imagined being overwhelmed by hundreds of Capability Statements. However, one would never need to assess all the Capability Statements at once for the same reasons that freshmen aren't graded in the same subjects as seniors until they reach the senior level.* A little-known piece of history is that something similar had occurred on the SEI's famous program to create the first widely known CMM prior to OPM3 when someone at the SEI released a questionnaire to summarize the original SW-CMM as it was first published, but the SEI community rose immediately to eliminate that attempt to recast the SW-CMM, which saved it. The nascent OPM3 community had no such luck in its 11th hour coup, and the die was cast, eventually leading to a schism.

“Trust is the root of empowerment.”

I tried to reason with PMI’s executives regarding the folly of reducing the OPM3 Capability Statements to a handful of cryptic assessment questions (dubbed the “Best Practice Self-Assessment Mechanism” or SAM), and I speculated that my warnings were ineffective because the OPM3 program had recently undergone a massive revolt in which most of the team of volunteers had quit PMI. [Trust](#) is the root of empowerment, and in arguments over *copyrights*, many volunteers felt PMI had broken a sacred trust by issuing a new copyright policy giving PMI total control of the deliverables that volunteers were creating, and the volunteers were convinced that one day PMI would monopolize their work (which turned out to be correct and is explained in the following pages). Many volunteers who weathered the storm were less confident in PMI than they had been before, but I remained committed and began rebuilding the team immediately. In the aftermath, despite my objections, PMI published the SAM and then launched OPM3 Online as an online version of OPM3 without the Capability Statements, an apple pie without any apples, which created a lot of confusion. OPM3 Online did not enable users to determine how to increase their maturity level because it lacked the Capability Statements, and PMI soon withdrew it.

I recall this well because I was involved from *cradle to grave* (no pun intended). I was the person who originally conceived and proposed OPM3 to PMI (on August 15, 1998). I was described as the visionary for OPM3 (per Appendix A). [I wrote the plan for creating the standard](#), designed the governance structure, appointed team leads, and formed a steering committee. I recruited the original team members, literally cold-calling and recruiting every project management, strategy implementation, and CMM expert I could find. At the request of a gentleman named Bill Wright, I documented the architecture I had proposed for OPM3 as a logical data model (which DNV later used to create a database version of OPM3), and I personally authored the criteria that distinguished the maturity levels (which I based on a paper about statistical process control by Professor George Easton, one of my professors at Emory University’s Goizueta Business School, who had been instrumental in the development of the Malcolm Baldrige National Quality Award). I personally created the OPM3 prototype that integrated all content from both the team and the public at large, content that was obtained through extensive primary research that I conceived and directed. Therefore, you can imagine how invested I was in the success of PMI’s OPM3 Program and understand why I have all the information to support these details.

But my investment was nothing compared to the team’s. The larger part of the effort to create OPM3 was performed by a vast team spanning 35 countries. Hundreds of volunteers performed extensive research to develop the Capability Statements, analyzing dozens of maturity models, surveying 30,000

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professionals, and contributing thousands of hours to refining the Capability Statements before the SAM gutted their work. It broke my heart for the volunteers, with whom I had formed strong bonds (per Appendix A). Despite utterly failing to prevent the team’s work from being compromised and despite being unable to negotiate [an open source and decentralized platform for evolution of the standard \(to mitigate prospective monopolization of the volunteers’ contributions\)](#), I was lauded by PMI’s CEO in a message he distributed to all PMI members saying

"John has contributed greatly to PMI." The Chair of PMI's Board of Directors Becky Winston added "In John's role as the leader of PMI's OPM3 program, he has immeasurably contributed to the growth of the profession." It was a pyrrhic victory, and that comment regarding the growth of the profession was, in retrospect, ironic. PMI's growth was remarkable in the coming years (especially under CEO Greg Balestrero), but growth of the project management profession could have been exponential if the priority had been [openness and sharing](#) instead of commercialism and control. PMI's initial decisions regarding the OPM3 Capability Statements were the canary in the coal mine, signaling more decisions to come that may have been governed by logic at the expense of wisdom.

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."

— **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

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 **he 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!"

— **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

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.

- **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.

- **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

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.

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 or frank.john.schlichter.iii@emory.edu.

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