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Alexander and the Indian King - Part 3
by John Schlichter
Commentary

Alexander and the Indian King – Part 3[1]

John Schlichter

Privacy

Empathy episode #1 led quickly to *empathy* episode #2. Hocking an abbreviated set of cryptic questions in an appendix of the OPM3 standard as a substitute for the Capability Statements, PMI decided to remove the Capability Statements altogether, which essentially meant removing the original product (i.e. the directory of Capability Statements) from its packaging or from the book written to introduce the Capability Statements. That's not a criticism of the book or its author. The book was written by a professional writer named Paul Wesman whom PMI hired to turn concepts and language dictated by me and a handful of others into something presentable. Paul and I had a great working relationship: Paul wrote "John directed the original team that developed OPM3 for PMI, and I was the technical writer on the team. John was a creative, visionary thinker in his field." Paul was a masterful writer. But the book, which a very small number of people were involved in creating, was not the original standard; the directory of Capability Statements was. If PMI's customers buy a copy of the book that is the OPM3 standard from PMI today, what they will get is the packaging for the Capability Statements but not the Capability Statements themselves. PMI decided to repackage the Capability Statements in software. I was invited to advise PMI on the matter.

> "If you buy a copy of the OPM3 standard (a book) from PMI today, what you will get is the packaging but not the Capability Statements."

The new packaging was software named ProductSuite, a database version of OPM3's Capability Statements created by Det Norske Veritas (DNV) on behalf of PMI based on the logical data model I had authored. Users were supposed to use ProductSuite to perform assessments of organizations and plan improvements based on those assessments. While I was delighted that ProductSuite was not another OPM3 Online, that ProductSuite based OPM3 assessments on the Capability Statements, and that ProductSuite got OPM3's logical data model right, I tried to do the job I was asked to do for PMI (to advise them), and told PMI reasons why the software was unnecessarily problematic and why it would probably never result in the most useful and valuable knowledge that one would hope to create through the aggregation of benchmark data, i.e. data comparing the ability of respective organizations to implement their strategies through project, program, and portfolio management (described in terms of the maturity levels and capabilities of those organizations). The GUI was confusing, the workflow was convoluted, and functionality was limited. I would wager if you asked anyone who used ProductSuite whether this is an accurate description, they would affirm that it is, with the possible exception, naturally, of certain persons who worked on creating ProductSuite at PMI and DNV.

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I won't bore you with the details except to say that ProductSuite's least attractive feature may have been that it was designed so users had to access ProductSuite over the Internet and allow their assessment data to be saved remotely in ProductSuite, which raised privacy issues of the sort that now plague Facebook for the simple reason that requiring customers to aggregate their data in a 3rd party product that is hosted remotely can result in a breach of trust. But Facebook did not exist back then, and PMI was not convinced by such critiques. PMI required users not only to access ProductSuite via the Internet but to save their assessment data in ProductSuite on those remote servers. The user could delete that data later, after exposing secrets to the risk of prying eyes. It came as no surprise that there were instances of *corrupted assessment data*, which I had warned PMI could happen from the outset. Speaking for myself, I never uploaded assessment data to ProductSuite that reflected the reality of any client's capabilities. As years went by, PMI never produced any OPM3 benchmark data, and OPM3 users were continuously disappointed by the discovery that the OPM3 Standard did not contain the essential ingredients needed to implement it.

To be clear, I am not aware of any actual privacy breaches that resulted from this risk of one. And to PMI's credit, ProductSuite was a huge improvement on OPM3 Online. But the OPM3 standard was updated to exclude the essential ingredients (the Capability Statements), and PMI required customers to buy the ProductSuite software to get access to those essential ingredients without clearly warning users of privacy risks and without stating that PMI would not create derivative products or reports based on assessment data without the users' explicit permission. PMI's logic justified PMI's decisions, which plainly reduced PMI's OPM3 standard to a commercial product in risky ways that gave PMI the power to corner essential aspects of the market for professional services pertaining to the execution of strategies through projects. And this aroused a schism regarding PMI's purpose.

Purpose

Unfortunately, you couldn't buy the ProductSuite software. You had to rent it, which is how *empathy* episode #2 brings us to *empathy* episode #3. As of 2006, PMI made users pay thousands of dollars to get certified in the ProductSuite software, which was remarkably user-unfriendly, and then users had to pay thousands of dollars annually in maintenance fees to continue to use it.

"OPM3 had been designed not to require expensive software, but users were locked in because there was no other way to access the Capability Statements."

OPM3 had been designed not to require *expensive software,* but users were locked in because there was no other way to access the Capability Statements. Full disclosure: I was hired to create the entrance exam for this certification and to pilot the certification classes, but I was outspoken that the Capability Statements should not be excluded from the OPM3 standard, that users should not be required to upload their assessment data to third-party servers, and that the pricing of the certification and software should be reconsidered. PMI's executives were not convinced by these pleas.

Excepting a small number of consultants, most people I pitched OPM3 to balked at the prospect of paying many thousands of dollars for the certification followed by many more thousands of

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dollars each year for software PMI had created from the work of PMI volunteers who never intended their work to be commercialized that way. To empathize with PMI, I see this as an organic strategy that was probably simply PMI's attempt to lead the way by following a path familiar to PMI, noting that PMI had created only one foundational standard to date (the PMBOK Guide) and only one prior certification (the PMP). Choices were made with imperfect knowledge of this new market and how to support it, choices that reflected PMI's expertise, which pertained more to controlling the IP than to ensuring it was used correctly. The latter would have required expertise from volunteers who had been alienated by past missteps and the risk of a monopoly. Consequently, the individuals comprising the relatively small community of consultants who were certified in ProductSuite were only certified in the functions of the software, i.e. how to start the software, how to open a new assessment project file, how to import Capability Statements into that assessment project file, etc. They were not certified in their knowledge of how to advance through the maturity levels of OPM3 or in their ability to guide an organization through those levels. And frankly, a great many had no idea how to do those things (which I know because PMI hired me to teach the OPM3 certification classes for about the first year of those classes, and I asked all the students). For many, it may have simply been the case that they did not know what they did not know.

So not only were users locked in to ProductSuite, many of those users who were locked in had little idea what they were doing. From one perspective, the fee to be locked in was a barrier to entry that some consultants may have enjoyed because it kept others out; and they may have relied on that barrier because their competitive advantage was primarily their *access* to the Capability Statements rather than their *ability* to transform organizations. Was this a commercial catastrophe that reduced a professional certification to point-and-click instructions for unnecessarily expensive software that did not prevent incompetence and may have even promoted it? Was this the result of confusing things PMI should do with things PMI should not do even though it could? Was this a failure to live up to PMI's original purpose? Some may think so, some may not, but if it was a failure it reflects poorly on me too for not being a more capable change agent earlier on. In retrospect, PMI's culture ate my strategy for breakfast, which was a meal that cost PMI millions of dollars, as I shall explain.

Accountability

Empathy episode #4 happened next (as a function of *empathy* episode #3). After Mark Langley was promoted to CEO in 2010, PMI set its sights on a company named HSI which had developed an alternative to OPM3 that contained benchmark data. HSI was founded by one of the OPM3 ProductSuite consultants who had been my deputy for a short time on PMI's OPM3 Program.

Readers will recall that aggregating reliable benchmark data from OPM3 assessments performed by OPM3 users was something PMI had been unable to do via ProductSuite. For one thing, PMI had not incentivized ProductSuite users to share with PMI sensitive information from their OPM3 assessments but gave users no way to opt out of sharing that data with PMI. To use ProductSuite to calculate assessment scores and compare scores across assessments, users had to upload their data to remote servers controlled by a third party on PMI's behalf. Assessment data revealed exactly how capable or incapable an organization was and why. The user could delete that data later, after exposing secrets to the risk of prying eyes. I am aware of some cases where this led to falsification of assessment data; I know I implemented a myriad of countermeasures to protect my

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own clients' data and only delivered the truth to my clients. Instead of correcting the underlying problems, PMI bought HSI in 2013 for $1.3 million, marketed HSI's benchmark survey as an alternative to OPM3, and started selling OPM assessments of organizations performed by HSI (PMI's proxy) using HSI's proprietary questionnaire.

Before revealing the outcome, I should tell you that HSI's founder had not only been my second for a season on the original OPM3 Program; later he became a fierce competitor to my firm. We liked each other, but we were competitors, e.g. one of HSI's clients hired my firm to complete HSI's engagement. HSI's client published a detailed account describing how OPM Experts LLC improved upon HSI's assessment, which HSI's founder signed off on. I am not suggesting the work of HSI's founder or his company was questionable. On the contrary, he was widely known for excellent work; why do you think I recruited him to be my deputy on PMI's OPM3 Program in the first place? We respected each other with a healthy dose of chiding and a measure of forgiveness, and he was gracious in both defeat and victory. Whether competitors do or do not want to view each other as competitors, competition exists whenever two or more entities pursue the same target(s).

PMI courted his firm at the expense of every other OPM3 consultant, culminating in an acquisition with far-reaching commercial ramifications for everyone, fundamentally altering the competitive landscape. It's a fact worth bearing in mind when considering PMI's role(s) in the field of project management, namely its primary role as the facilitator of the institutionalization of project management versus the many other commercial roles PMI has assumed. When PMI offers the same commercial services that other service providers offer (or substitutes for a competitor's offerings), and customers consider both PMI and the other service providers to be real options, PMI is competing with those service providers whether it realizes it is doing so or not. This places a heavy moral burden on the one organization everyone looks up to for leadership on the journey of transforming the field of project management into the profession of project management, and it creates the risk of an existential crisis. PMI's incoming CEO, please take note. *If PMI focused exclusively on institutionalizing technical and ethical standards that elevate the professional capability and status of project managers in the strategy implementation value chain and certifying professionals in those standards, it wouldn't have to compete with anyone. It would be able to enroll a caliber of expertise and support that only occurs in the wild beyond PMI's walls in ways PMI's own employees may never dream.*

PMI's acquisition of HSI was a shock to the community of OPM3 users. Then PMI doubled down. While PMI promoted its own assessment services as an alternative to OPM3, PMI advertised that PMI was "retiring" the OPM3 ProductSuite certification, which it did in September 2014. As soon as PMI retired the certification, both ProductSuite and the Capability Statements were gone. If you didn't already have the Capability Statements, you couldn't get them. PMI wouldn't sell them to you and wouldn't give a reason why (which was the subject of countless emails between a great many OPM3 consultants and PMI). It was a crushing blow to competitors who had been using OPM3 to provide services to organizations implementing strategies through projects. Imagine companies in the middle of implementing OPM3 (which often took many engagements over multiple years before OPM Experts created a more incisive solution), companies whose options dwindled for completing their implementations and seeing an ROI, much as the coffers of many OPM3 consultants dwindled. From the perspective of many PMI members, this was clearly a case of PMI doing consulting work for hire while degrading the ability of OPM3 ProductSuite consultants to do that work, and they challenged PMI, which raised the unsavory specter of

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litigation. Meanwhile PMI had convinced ANSI to endorse the OPM3 standard *without* the Capability Statements, which some people perceived as a nifty piece of misdirection. Thankfully, nobody sued anybody, and hopefully nobody will have any more problems with any of this as we all move forward, which is helped to the extent that PMI abstains from contentious forms of commercialism and operates above the fray.

PMI's mysterious refusal to explain why it wouldn't release the Capability Statements may have something to do with a decision to write them off in 2017 in abandoned assets totaling $3.5 million. The exact amount PMI wrote off and why is unclear, but it represented years of person-hours contributed by PMI volunteers. By then, many people believed the proprietary model PMI's subsidiary was using as an alternative to OPM3 wasn't even a maturity model (which may be why it was called a "diagnostic" and not a maturity model); it didn't tell users how to increase their maturity or process capabilities in Organizational Project Management as OPM3 had. Although the respective consultants using PMI's model from HSI must have had their own opinions about improvements clients could make, it seems there was no rabbit to be pulled from the proverbial hat, not that the consultants PMI had hired to use their newfound proprietary model were magicians in the first place. In one fell swoop, the PMI BOD withdrew the model PMI had acquired from HSI and decommissioned HSI, bringing PMI's total loss to about $5 million, and announced Mark Langley was retiring. HSI's founder promptly retired too. I let the matter of PMI's withdrawal of the Capability Statements go, and I saluted HSI's founder, whom I hope is enjoying a beach somewhere with his wife. The contest between me and HSI's founder was not a game, but it was proof that gentlemen need not lose their honor in a fight if they do not confuse what they can do with what they should do. *The minutes from the PMI BOD meeting in which all this happened explained the retirement of PMI's CEO on the heels of this $5 million drawdown as a "strategy refresh" that would refocus PMI away from organizational consulting and back on individual practitioners of project management.*

Many longstanding supporters of PMI including me applauded PMI enthusiastically regarding what little we thought we understood of the new strategy, but the Capability Statements were gone for good, notwithstanding the creation of a new *Organizational Project Management Member Advisory Group (MAG),* which proved completely ineffective in retrieving them. By this point the schism was cemented.

> "In one fell swoop, the PMI BOD withdrew the model PMI had acquired from HSI, decommissioned the consulting company PMI had bought for $1.3 million to perform assessments, bringing the total loss to nearly $5 million, and announced Mark Langley was retiring."

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Usefulness

These four *empathy* episodes produced *empathy* episode #5, which leaves only one more episode before I explain PMI's schism clearly. Continuing in the theme of emperors and their excesses, the Latin word for schism is *schisma*, a neuter word misstated in the feminine form by Holy Roman Emperor Sigismund of Luxembourg in a speech to the Council of Constance in the year 1414. When someone advised him of the error, he responded that because he was the Emperor the word would be feminine from then on, at which point a member of the Council stood and replied "The Emperor is not above the grammarians!" What does this useless bit of trivia have to do with PMI? Exactly 600 years later, in the year 2014, PMI published an "Organizational Project Management Practice Standard," which was supposed to be supplementary "how to" information to help users implement the "Organizational Project Management Maturity Model (OPM3) Standard." In addition to PMI's four foundational standards (namely the PMBOK Guide, OPM3, The Portfolio Management Standard, and The Program Management Standard), PMI published multiple "practice standards," which were basically how-to guides designed to help users put the standards into practice. Naturally many people had been asking how to implement Organizational Project Management (OPM) because PMI's second foundational standard, the Organizational Project Management Maturity Model standard (OPM3), no longer contained the Capability Statements. Of course, the Capability Statements would have told you step-by-step how to implement OPM, but the Standards Member Advisory Group (MAG) didn't see it that way. In an email exchange with a PMI official I realized that the Standards MAG was not even aware the OPM3 Capability Statements had been the centerpiece of OPM3 or that they were originally sold as an essential and integral part of the OPM3 standard. This was a failing of record keeping, knowledge management, and organizational memory that is thematic. And absent that knowledge, they decided that PMI should rebrand the "Organizational Project Management *Practice* Standard" as "The Standard for Organizational Project Management," which made it sound like a foundational standard.

> "PMI's decisions regarding OPM3's Capability Statements and subsequent standards pertaining to OPM degraded PMI's ability to achieve its purpose and set the stage for a new level of commercialism."

PMI rationalized this malapropism by saying that the practice standard would merit the "status of a (foundational) standard" because it would be developed on a consensus basis and reviewed through exposure drafts (or drafts released to the public for comment), though PMI appears to have forgotten that past practice standards had been developed through consensus and exposure drafts too, which was not a relevant justification for the practice standard's new and confusing appellation. I knew that PMI was planning to make a mistake in the naming, and I urged PMI to rethink it, but PMI refused, saying it was un fait accompli. I felt like "one voice crying out in the wilderness."

To empathize with the PMI Standards Member Advisory Group, I believe they may be forgiven for not knowing the esoteric history of the OPM3 Capability Statements that had occurred before their time. It is less forgivable the premiere association for the profession of project management does not have an infallible mechanism for record-keeping to preserve knowledge of important decisions, e.g. a cryptographically enabled distributed ledger. From the perspective of those who

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were unaware of the OPM3 Capability Statements, the decision to rebrand PMI's supplementary advice as "The Standard for Organizational Project Management" despite the prior existence of the "Organizational Project Management Maturity Model Standard" would have made sense. By comparison, for those who *were aware* of the OPM3 Capability Statements, it made about as much sense as saying that despite the existence of "A Guide to the Project Management Body of Knowledge" or "PMBOK Guide," which is all about *managing a single project*, PMI should publish something else based on far less research and name it "The Standard for Knowledge About Managing Single Projects." In other words, for precisely the same reason that Emperor Sigismund had been rebuked, it made no sense whatsoever when "The Standard for Organizational Project Management" appeared in 2018. *Caesar non supra grammaticos!*

The net result was that PMI's OPM3 Standard had been rendered ineffective as a way for users to assess accurately an organization's ability to implement strategies through projects, and a new Standard for Organizational Project Management was promoted as a foundational standard. Neither provided anything remotely resembling the Capability Statements to enable OPM assessments and corresponding improvements; they just weren't *useful* in that regard. Whether intentionally or not, PMI had once again put PMI in the position of filling a gap that PMI had created. Whether what PMI subsequently created, an endeavor called "Brightline," was created to fill that gap or created for other reasons, it is changing the competitive landscape through commercial products and services in ways reminiscent of PMI's expensive mistakes with HSI.

Integrity

Some people have made PMI's words and actions over the past 20 years mean that a logic has dominated PMI's executives in ways that led to a *schism* between those who believe PMI's raison d'etre is to advocate for the profession of most of its members (who are predominantly project managers) and others who believe PMI's purpose is growth through commercial endeavors in ways that make PMI

"PMI's Brightline website says that they will offer frameworks and assessments pertaining to designing and delivering strategy through projects."

look more like a training and consulting firm. Some actors invested in the latter may defend their actions by claiming that advocating the profession of project managers and expanding PMI's commercial endeavors are mutually beneficial agendas. That logic is superficially plausible and not entirely specious, but it is prone to pernicious pathologies that start small and grow big, as we have seen in the empathy episodes depicted above and shall see again in what follows. Some say PMI's "training" is non-commercial because it is provided by a nonprofit, or that the "consulting" is not consulting because the expertise is formulaic or rendered as products. Perhaps labels like "training" and "consulting" matter less than the content they denote, particularly any acts of commercialism pertaining to products or services beyond developing standards in Organizational Project Management, beyond certifying individuals in those standards, or beyond promoting those individuals and knowledge about what they do. Any endeavor undertaken by PMI beyond these essential functions degrades PMI's ability to transform the field of project management into the profession of project management. As I mentioned at the outset of this article, the American Medical Association and the American Bar Association studiously avoid competing in the marketplace by not offering professional services and commercial products that compete against

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the professionals whom they certify (or for that matter against the employers, suppliers, or customers of the professionals whom they certify). Instead, each association bases its certifications on standards of technical capability and ethical action invoked to distinguish each trade as a *profession*, not merely a *field* from whence it came.

PMI's schism was long in the making, nearly twenty years, stemming *at least as far back* as the fragmentation of the Organizational Project Management Maturity Model (OPM3), PMI's foundational standard describing how organizations implement strategies through projects and how organizations can become capable of implementing their strategies through projects successfully, consistently, and predictably. PMI's fragmentation of OPM3 led to PMI's commercialization of OPM3, which led to PMI's development of alternatives to OPM3 which PMI has marketed as its own services repeatedly (most recently through something called the *Brightline Initiative*). PMI's executives have not been convinced by objections to these decisions at each step of a progression, and in the eyes of many members the resulting commercialism has annulled PMI's legitimacy as the nonprofit arbiter of standards essential to transforming the field of project management into the profession of project management. Views about this differ, and the most effective way to achieve alignment is by discussing publicly what respective stakeholders perceived from PMI's actions, distinguishing what happened from what one made it mean, and appealing to all parties to articulate the possibilities they wish to co-create going forward. The solution is more dialog, not less.

> "The solution is more dialog, not less."

Though the essential history was elaborated in the preceding parts of this article, memory is an errant guest of consciousness. So, let's review. Soon after OPM3's publication, PMI 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. That is what happened, but what some people made it mean was that PMI valued revenue and control more than goodwill and freedom. Then PMI withdrew those components altogether, and consequently 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 did not respect her volunteers who had slaved to create that content based on the implicit agreement that the fruits of their labor would not be destroyed by their sponsor. PMI acquired its own consultancy as a subsidiary of PMI to provide assessments for hire using a proprietary model which was not OPM3. That is what happened, but what some people made it mean was that PMI's noble charter to institutionalize project management had been compromised, that PMI's charitable functions had given way to profit motives that personified their fears. Eventually PMI decommissioned that contentious acquisition, which brings us to the present: PMI has adopted a "strategy refresh" that appears to have included a decision that PMI was out of the organizational assessment business for good, though PMI has yet to explain its strategy refresh, so this specific point could be wrong, i.e. argumentum ad ignorantiam. PMI responded to stakeholders' questions about its "strategy refresh" with answers that simply created more questions. What some have made that mean is that PMI does not take these concerns as seriously as they feel PMI should. For some of those who have perceived PMI's new strategy as a return to PMI's original mission, PMI's corresponding actions have appeared misaligned because PMI immediately began advertising that it would start offering assessments again (through Brightline) as well as capability development services for organizations whose strategies

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are enacted by projects. To that end, PMI hired a former PMI executive as a third-party contractor to promote the same value proposition as OPM3 (making strategy implementation capable through assessments and capability development) without ever mentioning OPM3. That is what happened, but what some people have made it mean is that there are serious gaps between PMI's strategy and its execution.

I believe 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 about what PMI should do (i.e., institutionalism) with ideas about what PMI can do (i.e., commercialism) in the minds of some stakeholders. I believe some of the people involved may not be fully conscious of this distinction, but if they are, they may disagree because they think "institutionalism versus commercialism" is a false dichotomy, or because they esteem different values, or because they have different ideas about how PMI should serve society. Recognizing the presence of a plurality of values, I am motivated by the possibility of discussing these disagreements publicly to cultivate *empathy and alignment* within PMI's ranks, to cultivate *empathy and alignment* among PMI's own employees, among PMI's members, and between PMI's employees and PMI's members who form a whole not only greater than the sum of its parts but stronger through unity in diversity. This order of internal consistency, which produces strength through mutually reinforcing support, has a name: integrity.

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."

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— **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

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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

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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!"

— **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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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.

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