

Alexander and the Indian King: Part 4¹

John Schlichter

Prudence

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, which is explained in *empathy* episode #6, the culmination of all previous *empathy* episodes: the *cru de ta*. The episodes leading up to this one demonstrated PMI's logic, which has conflated advocacy for project managers with expanding commercial endeavors associated with professional services for organizations that implement strategies through projects, e.g. ProductSuite and HSI. This conflation appears to have resulted in gaps between PMI's current strategy and its execution, which PMI has not clarified adequately despite repeated requests for answers (which creates the risk of a fallacy of ambiguity, reification, or hypostatization). I have tried and failed repeatedly to obtain answers from PMI that would mitigate this risk.

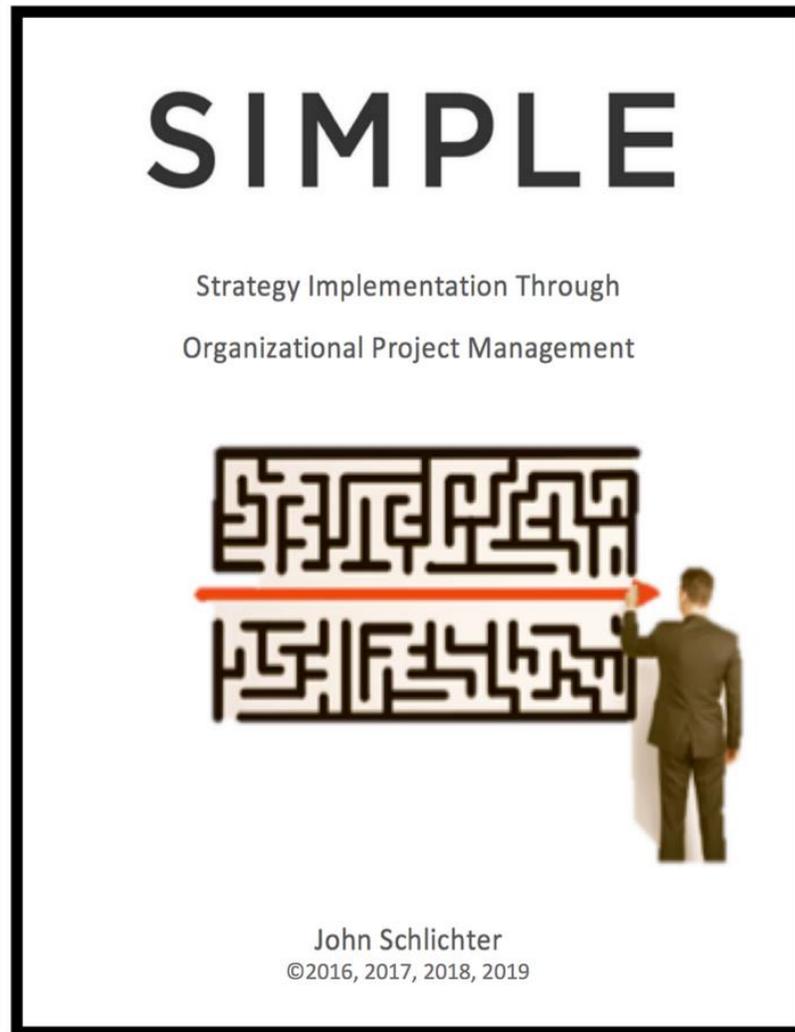
My firm, OPM Experts LLC, abandoned OPM3 when PMI bought HSI, and we developed a proprietary model to replace OPM3, which is the [Strategy Implementation Maturity Protocol for Learning Enterprises \(SIMPLE®\)](#). From the first day OPM Experts began marketing SIMPLE® in 2016, the firm has used the image of a maze with a vivid red arrow cutting through it as the only image to brand the offering (Figure 4). Soon thereafter, despite the PMI BOD's apparent strategy to pivot away from organizational consulting and back to helping individual practitioners of project management demonstrate their professionalism individually, PMI launched a marketing campaign in the latter part of 2017 called the "Brightline Initiative" designed to "*generate interest in and demand for project management capability within organizations.*" PMI's Brightline website emphasized "smart simplicity" as a key principle of its campaign and used the image of a maze with a bright line cutting through it to convey this idea.

Indeed, Brightline's lead consultant narrated a video rendering of a bright arrow cutting through a maze to bridge the gap between strategy design and execution, emphasizing the word "Brightline" in punctuated plosives suggesting the "Brightline" brand's derivation from an image of this vivid arrow cutting through a maze. In effect, OPM Experts LLC, widely known for having led the creation of OPM3 and for being a leading provider of maturity assessments and capability development programs pertaining to bridging the gap between strategy design and strategy execution, created an alternative to OPM3 that emphasizes simplifying strategy implementation in smart ways and branded that with a bright line cutting through a maze, and immediately thereafter, *PMI did precisely the same*

"If PMI is perceived as competing with project management service providers, who gains and who loses? Everybody loses."

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thing. I know great minds think alike, but naturally I had some concerns.



**STRATEGY IMPLEMENTATION MATURITY
PROTOCOL FOR LEARNING ENTERPRISES (SIMPLE)**

Figure 4: Before PMI created Brightline and began marketing the need to simplify strategy implementation, which was a message PMI paired with the image of a bright line cutting through a maze, OPM Experts LLC had already launched SIMPLE© to propose simplifying strategy implementation, using the image of a bright red line cutting through a maze.

PMI’s officials and the consultants PMI had hired to carry out the Brightline Initiative appeared to me at first to present Brightline and PMI discretely, framing Brightline as its own thing though Brightline was conceived by PMI and funded by PMI to advance PMI’s interests. Many people were shocked to learn Brightline was a PMI action when I began telling them so as I wrote this article, but PMI’s corporate communications about Brightline have since improved on the specific point of clarifying the relationship between PMI and Brightline. At the bottom of the “About”

page on the Brightline website, PMI has stated clearly that the Brightline Initiative is led by PMI. Overall, this appears to have been a *rebranding* effort, paving the way for PMI to embark on various sorts of commercialism, including some varieties PMI has tried before and other varieties that are unprecedented in PMI’s history (per Figure 5).

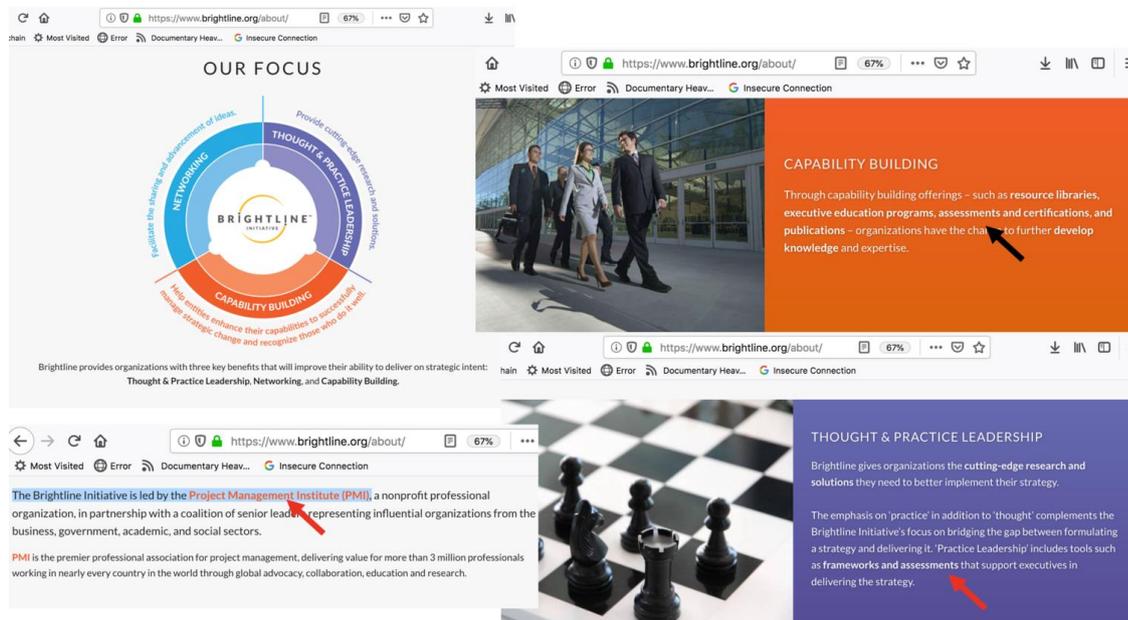


Figure 5: PMI is offering strategy design assessments and strategy design capability development services through an initiative PMI has branded “Brightline.”

Although a member of PMI’s current Board of Directors has explained that “Brightline is not an entity,” it does have a leader, who appears to be Mr. Ricardo Vargas, a clubbable, hail-fellow-well-met personality who promotes PMI effusively in a strong accent that evinces his non-Anglophone extraction. He was hired by PMI in the role of Executive Director of Brightline “to further the understanding and utilization of project management in organizations.” Mr. Vargas was formerly the chair of the PMI Board of Directors before the BOD’s recent strategy refresh, i.e. during a period when issues described above festered. If it wasn’t clear that Mr. Vargas is not an employee of the non-entity known as the “Brightline Initiative” or that he is not an employee of PMI for that matter, make no mistake: he is neither. He runs a small project management consulting firm that operates exclusively in the construction industry and a small project management training company which markets training that is not specific to any industry. PMI has been arranging for him to speak at management conferences across the globe, which has required him to expose his public speaking capabilities to venues where presenters are always expected to present in English, which is not his first tongue, on topics that may be new to him, i.e. Organizational Project Management (implementing strategies through projects) and Organizational Project Management maturity (how to turn ideas into reality successfully, consistently, and predictably). His persistence has been remarkable, and whether he is or is not an expert, I think he’s doing a great job coming up to speed. However, the unfortunate subtext from PMI is that PMI’s current employees are incapable of communicating credibly at the executive level about

“Is PMI promoting a proprietary model again instead of PMI’s standard?”

“closing the gap between strategy design and delivery.” Note: after earlier drafts of this article were shared with PMI, I noticed more PMI executives doing public speaking engagements (though PMI continues to sponsor Vargas for a similar role, despite perceptions of a conflict of interest).

It is unfortunate for two reasons: 1) there clearly are PMI employees who can communicate credibly at the executive level about “closing the gap between strategy design and delivery,” and 2) the risk of perceptions of a conflict of interest associated with using a contractor to market PMI services related to the contractor’s own for-profit training company’s services, which target the same customer segments that PMI has hired said consultant to pursue on PMI’s behalf, would be mitigated capably by PMI if PMI simply never used contractors for this task. We can expect questions of a conflict of interest to be dismissed by those invested in the issue, but the following question remains: why isn’t PMI using PMI’s own employees exclusively as its spokespeople for activities that PMI clearly treats as one of its highest priorities? Whether PMI will let Vargas go as PMI’s new CEO takes his mantle, the larger question is: what message is PMI promoting through Brightline in a whirlwind tour of the world’s management conferences?



Figure 6: The message PMI is promoting through Brightline came straight out of the OPM3 standard, which has used this image in every edition to date.

PMI’s slogan for the Brightline marketing initiative is “closing the gap between strategy design and delivery.” If that sounds familiar, it may be because it comes straight out of the OPM3 Standard, which even includes *a picture* (Figure 6). It’s how PMI has been promoting OPM3 for years. It’s in PMI’s current product description for OPM3 in PMI’s online bookstore (Figure 7). Yet PMI’s Brightline Initiative (which embodies PMI’s dominant logic of *marketing the implementation of strategies through projects*) never mentions Organizational Project Management or OPM3, which are respectively *PMI’s official term for implementing strategies through projects* and *PMI’s original foundational standard for OPM*. Brightline’s website does not cite either OPM or OPM3 even once.

Who benefits from Brightline’s deafening silence on OPM and OPM3? Does PMI think Chief Strategy Officers and other C-level personnel need references to project management dropped for them to understand PMI’s message? Surely somebody at PMI can explain OPM and OPM3 in simple terms that appeal to executives. Let me show you how easy it is to pitch OPM and OPM3 to executives:

- Your strategies regarding where and how to compete are enacted through projects, temporary endeavors undertaken by teams to produce unique results.
- It’s essential for your organization to 1) choose the right projects to enact your strategies and 2) deliver those projects capably. We call this “Organizational Project Management” or “OPM,” a system that integrates project, program, and portfolio management.
- To implement your strategies successfully, consistently, and predictably, we need to do four things: 1) standardize, 2) measure, 3) control, and 4) continuously improve Organizational Project Management.
- These four agendas (or maturity levels) have been elaborated in detail by a global team of experts as a one-of-a-kind model called “OPM3,” a PMI standard endorsed by ANSI, which executives in renowned organizations across the globe have used to assess the capabilities of their organizations and to identify highly actionable improvement options.
- Achieving world class capabilities to enact your strategies starts with an OPM3 assessment, which involves someone collecting and analyzing information and producing an assessment report with a roadmap for improvement.

Speaking from experience, I can promise this pitch is appealing to CEO’s and other C-level personnel. And pitching it isn’t complex or difficult. On the other hand, it doesn’t work without the Capability Statements (which are now missing from the OPM3 standard, having been withdrawn by PMI without explanation, as was elaborated in previous installments of this article).

Here’s the rub. Though OPM and OPM3 are entirely absent from PMI’s Brightline collateral, PMI’s Brightline website has said that *they* will offer frameworks and assessments pertaining to *designing and delivering* strategy through projects, specifically assessments crafted for capability-building in strategy design and strategy implementation through projects (Figure 5). Who “they” are, whether PMI’s employees or the consultants hired by PMI, is one of many open questions. What should we think about a marketing effort given the best resources to promote a third-party contractor who has no prior experience in OPM3 and never speaks of it while touring the global circuit of management conferences to promote an initiative that is offering an alternative to OPM3 after OPM3 was rendered ineffective by PMI? Is PMI promoting a proprietary model again instead of PMI’s standard? For that matter, is PMI enlarging PMI’s scope, which has been defined since 2003 by Organizational Project Management (or strategy implementation through projects)? Is PMI enlarging that scope to include strategy *creation*? More specifically, is PMI commercializing services pertaining to strategy design? Indeed, this appears to be the case.

The screenshot shows a web browser displaying the PMI marketplace product page. The browser address bar shows the URL: <https://marketplace.pmi.org/Pages/ProductDetail.aspx?GMF>. The page features the PMI logo and navigation links: HOME, ABOUT, JOIN PMI, CONTACT. Below the logo is a search bar and a menu with categories: myPMI, Certifications, Membership, Learning, Events, Business & Government, and PMBO. The main content area displays the product 'Organizational Project Management Maturity Model (OPM3®) - Third Edition' by Project Management Institute. The product cover is purple and yellow, showing a pyramid structure. The price is listed as \$95.95, with a member price of \$76.75. A red arrow points to the text: 'Organizations turn to OPM3® because it helps them bridge the gap between strategy and individual projects, and provides a way to advance strategic interests through the application of project management principles and practices.'

Figure 7: “Bridging the gap between strategy and projects” is how PMI had been marketing OPM3 long before Brightline.

What is PMI selling? I asked Brightline’s lead consultant that question in what was the first and last conversation I ever had with him. It occurred publicly on LinkedIn. In that brief conversation, I asked him to clarify what PMI was selling with Brightline, and he responded in writing that Brightline did not involve selling any products or services and *never would* (Figure 8). I thought that was an extremely clear and strong statement for Brightline’s lead consultant to make. I thanked him, and he said I was welcome. It was a polite exchange, and he told me to stay connected with him. Assuming he was speaking candidly, I decided to keep a dialog going, and a couple days later responded to a post on LinkedIn by Brightline that asserted people are rational, which Brightline had asserted in the context of strategy implementation. I asked “What makes Brightline

think people are rational when it comes to strategy implementation?” I remarked that such assertions, which Brightline had made repeatedly, sound nice, but they are unsupported and unfounded, per nobel laureate Daniel Kahneman. I saw no response from Brightline but hoped privately that Brightline’s lead consultant would correct the issue before anyone screamed “the King has no clothes!” You see, we would like to think people are, as a rule, rational, but we would be naive to do so. The fact that people are not rational actors has been widely known among academics and consultants for decades. It is the basis of behavioral economics and Nobel prizes for work that has pervaded business culture and crossed over into popular culture.

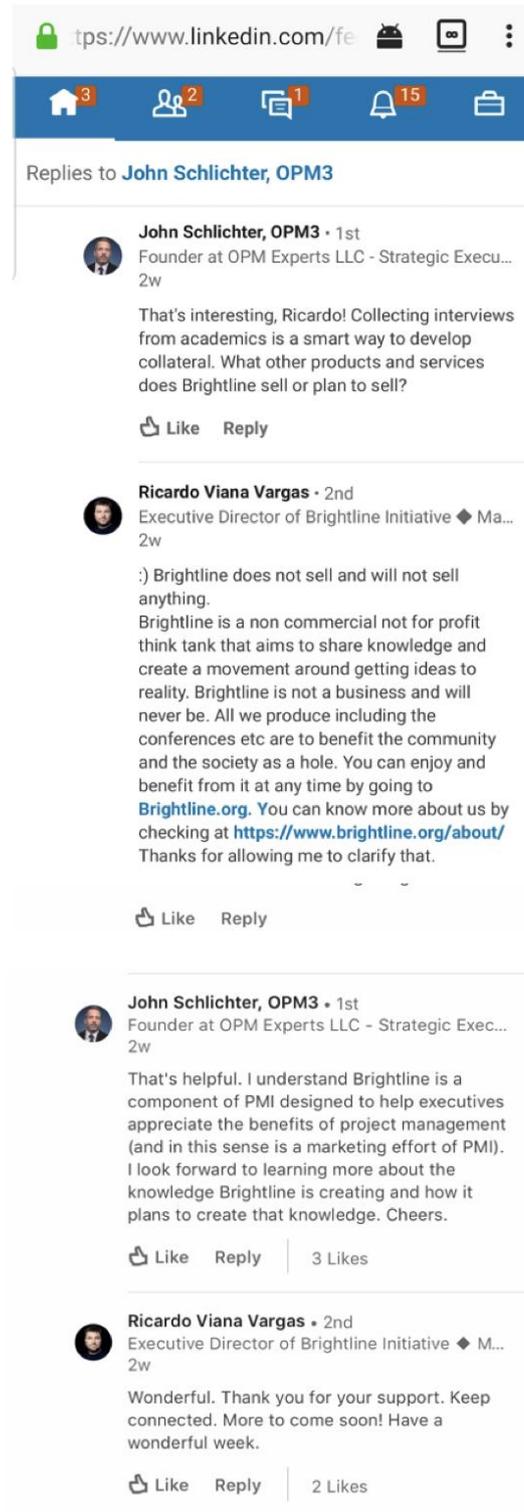


Figure 8: The lead consultant of PMI’s Brightline marketing initiative declared Brightline will never be involved in selling anything.

A week later, despite Brightline’s silence, I decided to share with Brightline’s lead consultant a book about competitive strategy that I thought he would appreciate, i.e. Professor Jag Sheth’s “The Rule of Three.” As I mentioned at the outset of this article, a key message of this classic from Sheth and his co-author Rajendra Sisodia is that market specialists consistently destroy themselves if or when they try to evolve into “full-line generalists.” The same is true when full-line generalists decide to become market specialists. In either case, the company falls into what Sheth and Sisodia call “*the ditch*,” per Figure 9. The data on this phenomenon is quite clear. Most markets will sustain no more than three major players.

“Market specialists consistently destroy themselves if or when they try to evolve into full-line generalists.”

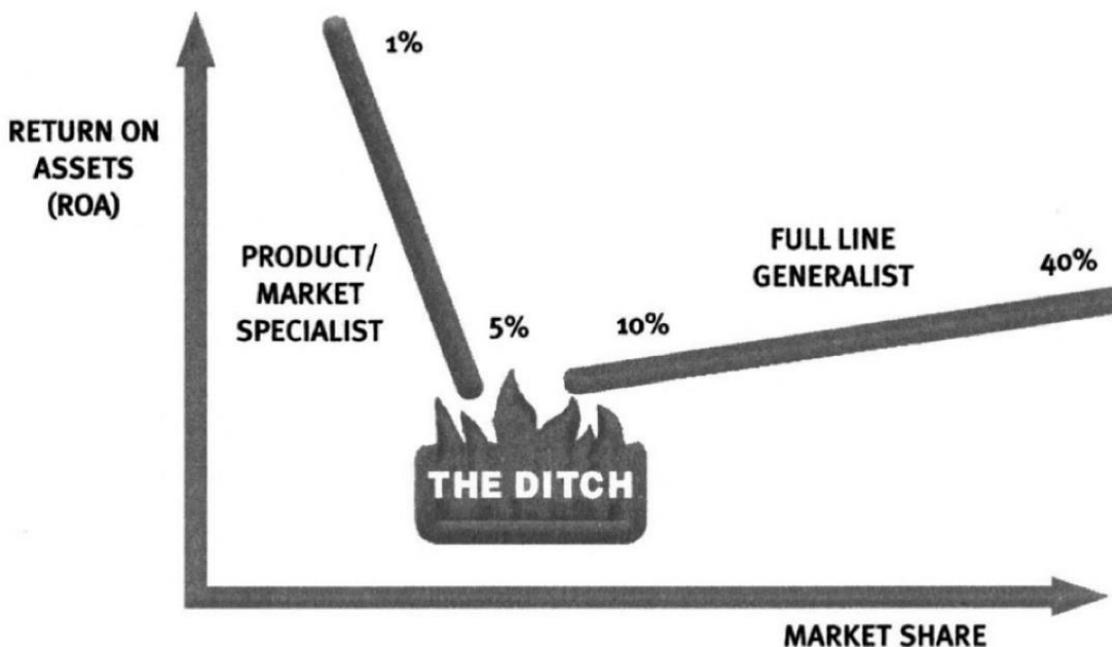


Figure 9: As PMI is lured away from its specialization of focusing on project managers and toward strategy offerings for organizations, it risks falling into the ditch.

The difference between a schism and a chasm is that a schism is a split or separation within a group or organization that is typically caused by discord, whereas a chasm is a deep, steep-sided rift, fissure, gorge, abyss, or *gap*: all words equivalent to Sheth’s ditch. The example I had in mind when it occurred to me to share “The Rule of Three” with Brightline’s lead consultant was a non-profit that has specialized in the project management market but is aspiring to become something more closely resembling the core functions of a strategy management consulting firm. I asked Professor Sheth if this was a correct interpretation of the “Rule of Three,” and he confirmed that it was, saying “PMI is a market specialist. So long as PMI keeps the individual members as the market segment it serves, PMI can add more services that target the future needs of those members. The idea is to gain more share of wallet from the target market (namely the practitioners of project management) and to increase PMI’s stickiness.” *In other words, PMI’s CEO should*

direct Brightline to stop targeting executives with offers of professional services pertaining to strategy design and implementation if PMI wishes to avoid the risk of converting PMI's schism into PMI's ditch.

Openness

When I reached out to Brightline's lead consultant to share the "Rule of Three" with him collegially, I was puzzled to learn *he had blocked me* on LinkedIn. I looked at the Brightline website to see if I could make sense of this and was surprised to see things that smacked of strategy consulting. Buffeted from Brightline blocking me, I was perturbed by parochialism on the part of PMI's protégé. I had never even spoken to him. Just one short written exchange on LinkedIn: that was the extent of our interaction before he shut me down. To my mind, this was exactly what Harvard Business School's Novartis Professor of Leadership and Management Amy C. Edmondson meant when she wrote that leaders who silence others to create a culture of "fitting in" and "going along" (instead of cultivating *empathy*) doom their organizations in the knowledge economy. It fit a frustrating pattern of insularity and group-think, but I asked myself "If I give up entirely on this person, who gains and who loses?" Everybody loses, especially PMI. Is that desirable? No. I decided online interactions were prone to miscommunication, and if I wished to help PMI navigate storms I saw on the horizon we would need to find a way to communicate with each other (for example, through an article like this one). I can empathize with Brightline's lead consultant for not wanting to engage pundits whom he may *perceive* (incorrectly) not only as ideologues but as "adders fang'd." For that matter, I can understand why someone in his position would not want to communicate with anybody who invites a very close look at the Brightline Initiative and how it is reconciled to PMI's strategies and aspirations. More to the point, my demons were mine to exorcise, and I believed they were his demons too.

"A schism appears to have emerged between those who envision PMI as a market specialist and those who envision PMI as a full-line generalist."

"Has a significant change in the scope of PMI's operations, namely strategy management assessments and capability development consulting, been blessed by the BOD?"

If phronesis (practical wisdom) is the exorcism of imprudence, then the rite is half a dozen questions, which Oxford University Saïd Business School's Bent Flyvbjerg catalogs as: *Where are we going? Who gains and who loses, and by which mechanisms of power? Is this*

development desirable? And what, if anything, should we do about it? It is one thing to improve the value proposition of project management by framing it as the way strategies get implemented. It is another thing entirely to offer training on the mechanics of strategy design and services pertaining to assessing and developing strategy design and strategy delivery capabilities – all things PMI's Brightline marketing initiative does. And let's be clear: anyone who argues that assessing and developing strategy design and strategy delivery capabilities in organizations does not constitute consulting is probably someone who does not know either what is required to assess such capabilities in an actionable manner or what is required to enable organizations to develop

such capabilities. It surely is consulting, but if my use of the term “consulting” is a sticking point, just replace “consulting” with “commercial offering beyond the scope of a trade association.”

Wisdom

Whether the object of our scrutiny is Brightline or any other product or service proffered by PMI, the litmus test is whether the service pertains directly and exclusively to those very few functions essential to PMI’s purpose. Do you ever see the American Medical Association providing training or maturity assessments for executives whose strategies involve medical interventions or doctors? No, you do not. Do you ever see the Board of Nursing providing training or maturity assessments for executives in any organizations where nurses work? No, you do not. Do you ever see the American Bar Association providing training or maturity assessments for executives in any organizations where lawyers work? No, you do not. So why would the Project Management Institute start promoting its own commercial offerings pertaining to assessments and capability development services to help organizations design and deliver strategies?

I empathize with those who believe these kinds of commercial endeavors could jeopardize PMI’s legitimacy as the premiere association for the profession of project management. That is a real risk unless, of course, customers and stakeholders simply never realized Brightline was PMI’s auxiliary staff or proxy. Indeed, nobody whom I had discussed Brightline with at first had any idea it was a PMI operation. Others may still go unaware despite PMI’s renewed clarification of its role as Brightline’s sponsor, and it seems like an unnecessary risk, one with low probability but high impact, i.e. a Black Swan, the risk probability/impact combination that people are most prone to ignore at their peril. Competent project managers know that less competent project managers always leave Black Swans unmitigated. By contrast, competent project managers always mitigate Black Swans. But whoever is making decisions about PMI 2.0 and Brightline clearly doesn’t see things this way. They may have excellent reasons, but they have not given them. Perhaps outsourcing the matter to a third party was in fact somebody’s ill-conceived attempt at mitigating the risk. Either way, a dearth of information regarding PMI’s refresh strategy and how Brightline is reconciled to that strategy foments questions. It doesn’t help that the third-party spokesperson PMI has hired to communicate information about these things signals to those most interested that probing questions are unwelcome. PMI’s CEO would be wise not only to reconsider Brightline entirely but to assess PMI’s policy for management of stakeholders who have serious and challenging questions about Brightline or any other products and services PMI proffers.

When I scanned PMI’s Brightline website, I saw that the site promoted a certification course called “Bridging the Gap Between Strategy Design and Delivery,” echoing OPM3 without once naming it, which occurred to me as an opportunity to develop new products and services without reopening old wounds, at great risk of creating new wounds. The site indicated that the course (Figure 10) would be available free “for a limited time,” suggesting Brightline will be involved in sales despite clear statements from Brightline’s lead consultant to the contrary. But it’s not the pricing so much as the very nature of the services and how they may be perceived that is most troubling. To that point, I was taken aback to see PMI was co-branding this initiative with the Boston Consulting Group (BCG), which appears to have been the first of PMI’s “coalition partners” in this new endeavor. BCG is one of the “big five” strategy consulting firms.

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BRIGHTLINE INITIATIVE

Bridging the Gap Between Strategy Design and Delivery – Course Trailer

OCT 18, 2018

An online course to turn ideas into results. A partnership between Brightline Initiative and Coursera. Through the 10 Guiding Principles, Brightline™ Initiative puts the power of idea implementation and strategy execution in the hands of Senior Executives with this free course on Coursera. You will explore how external and internal factors impact your and other organizations' capability to implement strategies.

You will understand Brightline's 10 Guiding Principles and see how they are brought to life in real-world examples from the profit-, non-profit- and government sectors.

For a limited time, Brightline partnered with Coursera and is offering vouchers for the free course. [Go to course page.](#)

Figure 10: PMI's Brightline marketing initiative is promoting a course that mimics the purpose and messaging of the OPM3 Standard without ever mentioning OPM3 or the work of the volunteers who created OPM3.

These things concerned me for many reasons, not only because I believe there are serious structural problems intrinsic to conflating a trade association with a commercial endeavor, but also because I had already experienced competing with PMI once before during the HSI crisis and would rather not have to do that again. Competing with PMI is not aligned to my own vision for the profession that will ultimately overcome the [wicked problems](#) facing humanity in the 21st century. If PMI and OPM Experts LLC (or PMI and other project management consulting firms) are misperceived as competing, who gains and who loses? Everybody loses. By what mechanisms of power? Everybody loses by the mechanisms of power endemic to commercialism, particularly competition and monopoly, which degrade PMI's legitimacy and therefore its ability to transform the field of project management into the profession of project management, especially when either party exercises power to silence the other. Is that desirable? What should be done? This is phronesis.

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 jschlichter@opmexperts.com or frank.john.schlichter.iii@emory.edu.

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