

Alexander and the Indian King - Part 5 ¹

John Schlichter

Discernment

I knew there were challenges associated with PMI's governance of OPM3 from the beginning, but I stuck with it, believing we could work those things out, and my firm benefited even though some significant issues were never resolved satisfactorily. OPM Experts received OPM3-related requests from all kinds of fascinating organizations. Some requests we responded to directly, e.g. the governments of Hong Kong, Kurdistan, and Saudi Arabia, and blue chip companies like IBM, Johnson & Johnson, and Microsoft. Others we passed along to partners or colleagues, e.g. the government of Iran asked us to use OPM3 to audit all of Iran's energy projects, starting with its nuclear portfolio, which we passed on due to sanctions. We made powerful friends along the way and have served a "who's who" list of amazing entities whom we have helped achieve dramatic results in terms of strategy implementation. I wrote vignettes about some of these engagements: [Amana](#), [Battelle](#), [CARICOM](#), [European Union's External Action Service](#), [Harris Corporation](#), [Johnson & Johnson](#), [Kurdistan Regional Government](#), [Melco Crown](#), [Microsoft](#), [Northrop Grumman](#), [Panasonic](#), [Popular Financial](#), [SAP](#), and [Saudi Ministry of Interior](#). Overall, we had a good run with OPM3, and there is [much more](#) to come (though some stories may never be told), but OPM Experts moved on by creating [a better model](#). We never wanted any conflict with PMI, whom we did our best to help create industry standards that would enable PMI to elevate the field of project management to the profession of project management.

My interest in these matters has evolved from OPM3's apotheosis as I have cultivated *empathy* for the leaders involved in this narrative. Now I am more intrigued by [the institutional logic of the profession](#) than the conflicts of interest and specific instances of competition implied above. OPM Experts LLC is a firm of specialists, our place in our niche is secure, and if the Brightline brand was inspired by OPM Experts LLC we should be flattered (even if we were not acknowledged). However, OPM3's fate and what followed beg questions that interest many: Where is PMI going? Who gains and who loses, and by which mechanisms of power? Is this development desirable? What, if anything, should we do about it? The logic that produced PMI's decisions in the six episodes described above persists. Consequently, 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, i.e. two camps. There are those who believe PMI's *raison d'être* is to advocate the profession of most of its members (project managers) through standards, certifications, conferences, networking events, and educational materials. Full stop. There are others who believe PMI's purpose is growth through expanding commercial endeavors, e.g. vertical integration, i.e. combining project management advocacy with strategy management advocacy in ways that make PMI look more and more like a strategy consulting firm. *I am wary of people in the latter camp who rationalize their actions by suggesting it serves the former camp.* Are you? We are faced with questions of phronesis that appear to some stakeholders all but lost to PMI's leaders (especially leaders directly involved in these issues who dismiss these concerns with a wave of the hand). Has phronesis been

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lost to PMI executives in ways that have allowed a logic of instrumentality to trade PMI's most noble aspirations for more pedestrian ambitions at society's expense?

I will go on record as saying it is painfully clear to me the field of project management is not the profession of project management that it needs to be to meet the exponential future that is accelerating toward us. I have led countless assessments of Organizational Project Management in organizations of all kinds. One thing which has struck me is that so many of the organizations which have hired me to assess how capably they have implemented PMI standards have been organizations that fundamentally misunderstood the most important aspects of PMI's standards. Organizations reap huge benefits by correcting those errors, but why were those errors made in the first place? Can we truly say that something is a standard if most organizations implementing it do so incorrectly? Then there is the question of certifications. If organizations comprised of professionals certified by PMI are implementing PMI standards incorrectly, what does that suggest about needing to improve the link between standards and certifications? More importantly, what do these things suggest about the opportunity to improve the efficacy of PMI's standards and PMI's certifications to help transform the field of project management into the profession of project management? Leaders interested in tackling that opportunity should consider the four freedoms essential to standards development (outlined above), and it may be helpful to debate whether PMI's commercial interests have interfered with the standards development process. Could the American Medical Association create and arbitrate standards for America's doctors if it engaged in the development of medical devices or the acquisition of hospitals? Could the American Bar Association create and arbitrate standards for America's lawyers if it did any of the things that a law firm does or if it competed with companies the likes of LexisNexis or Amazon and proffered productivity tools or artificial intelligence products that changed the ways lawyers ply their trade? Doing so would surely alienate essential stakeholders and de-legitimatize the trade associations. In short, there are profound issues pertaining to codification of knowledge as standards and, by extension, profound issues pertaining to certifications, that merit any organization involved in such endeavors to seek root causes for those issues. Is commercialism a culprit?

I humbly suggest that PMI's leaders should distinguish knowledge creation activities like developing standards, arbitrating certifications, hosting summits, and publishing books from capability development activities like maturity assessments and organizational improvement services. PMI must neither engage in nor sponsor any companies who engage in the latter unless it will subsidize all competitors equally. Knowledge creation activities may or may not be contentious commercial activities depending on how they are carried out, but facilitating capability development in organizations is nearly always a highly competitive commercial activity, whether that takes the form of a service offering or a product offering. Moreover, the development of expertise (and services) pertaining to strategy formulation moves PMI into the realm of strategy consulting, which is bad for several reasons. First, the transition from a market specialist to a full line generalist is extremely risky. Sheth's research shows that companies undertaking this transition suffer massive losses in terms of market share, i.e. the infamous "ditch." Second, not only is the transition perilous, but the destination is too. Strategy consulting is not a space that PMI is wise to compete within as there is room for no more than three dominant players, and those three already exist, as do others. They are much more powerful than PMI, and the state of rivalry is intense. Third, expanding PMI's remit through professional services degrades

PMI's legitimacy in pernicious ways, which underscores an obvious strategic trade-off required to resolve inconsistencies of image and reputation.

Rationalizing PMI operations beyond the exclusive functions essential to its scope is a [trap](#). For example, PMI's BOD has justified Brightline as a perfectly *logical* way to create demand for project management (though, frankly, I was not aware demand was lacking), but PMI does not have to get into areas like strategy design training and capability development offerings to create demand for project management in organizations. To create demand, we need only articulate how strategies are implemented through projects, which does not require one to take positions, whether generally or specifically, on how strategies are designed or how they should be designed (as Brightline is doing). Whether strategies are top down (or deliberate) or bottom up (or emergent), and whether they occur at the corporate level, business unit level, or functional level, they are merely inputs to project selection and portfolio design, which is where PMI's narrative should begin. PMI can frame strategies as inputs that are a given without migrating into the area of strategy design and the slippery slope of advisory work.

I suppose PMI could create a spin-off with BCG, abandoning any claim to legitimacy as a non-profit association and relinquishing its original purpose and mission; I considered a similar play for OPM Experts LLC to evolve from its specialization to full-line strategy advisory services when a partner at a firm like BCG asked me what it would take to convince me to create and lead an army of OPM3 assessors on their behalf. As tempting as the suggestion was, I decided against it. McKinsey has contracted work to OPM Experts' Senior Client Advisors repeatedly, but unlike Alexander I am not possessed to pursue empire at the peril of those whom I lead. Having said that, such moves are not without precedent, and they are alluring. How do you think so many companies fall into the ditch? If it seems like an alluring but dangerous option for PMI but PMI denies it is tempted by that option and asserts it shall not pursue that option, one may wonder why *it looks like PMI is pursuing that option*. Many stakeholders want explanations and reassurances. And let me be clear: this isn't just about Brightline. It is about any commercial endeavor PMI undertakes. What businesses is PMI in? Does the public even know the full extent? Exactly how does PMI decide what is inside and what is outside PMI's scope? Monopoly is to empire as civil suits are to civil wars, which fragmented Alexander's dynasty in a fraction of the time it took Alexander to create it.

Whatever strategists choose in terms of strategy, whether to risk the ditch or to avoid it, they should see *strategy communications* as a form of reputation management. PMI should reflect on how it is communicating PMI's "strategy refresh" (PMI 2.0), Brightline's activities and any other commercial endeavors. Moreover, PMI should see this article as a service for explaining a narrative that occupies PMI members who fear speaking their truth to power and provokes sleeping giants who fear nothing at all. PMI should embrace the message (without shooting the messengers) for distinguishing risks PMI almost certainly did not intend to create and most certainly should avoid. In the context of PMI's noblest aspiration to lead the Project Management Institute to cultivate the institution of project management, PMI should recognize that institutional change influences why some choose to communicate while others do not and that it can make a difference to reputation, as Oxford's Richard Whittington has [explained](#). How does reputation create or destroy value? Where do reputations come from? How do we measure them? [How do we build and manage them?](#) What are the implications for elevating the field of project

management to the profession of project management? After twenty years of pleading with PMI to consider these questions seriously, I am reduced to polemics.

Clarity

So long as we are here, let's move beyond dealing with the Brightline question in the abstract. Let's put a fork in it. Will PMI move further into strategy management territory, advising corporations how to develop differentiation strategies, how to allocate cash among their business units, or how to leverage economies of scale? Per PMI's Brightline website, assessments pertaining to the ability of organizations to design and implement their strategies through projects (as well as capability development services in those areas) are clearly on the table, which raises many questions:

“Is this merely inside baseball or is it a zero-sum game that the umpires are betting on?”

- What exactly are these assessments and capability development offerings described on the Brightline website pertaining to the ability of organizations to design and implement their strategies through projects?
- Has a significant change in the scope of PMI's operations, namely strategy management assessments and capability development offerings, been blessed by the BOD?
- Has it been communicated clearly to PMI members?
- Does PMI intend to vertically integrate its project management business and its new consulting business? Is this a shift away from project management advocacy toward areas like strategy management, business agility, or emerging technologies?
- If these assessments and capability development offerings won't be sold under the Brightline banner, as Brightline's lead consultant claims, then does PMI intend to provision these services outright?
 - How will PMI manage the issue of marketing the service under the Brightline banner but provisioning it without involving Brightline as Brightline's lead consultant promised?
 - Will PMI do so through an online assessment product like OPM3 Online?
 - If so, what has PMI learned from the failure of OPM3 Online?
- Will PMI use the OPM3 Capability Statements for these *capability* assessments and *capability* development activities?
- If OPM3's Capability Statements aren't used, will the capability assessment and development protocols be based on platitudes (e.g. marketing materials from PMI's Brightline website), or will they be based on peer reviewed research? And if they are based on peer reviewed research, will that be commensurate to the primary research done to create OPM3, i.e. surveys to 30,000 professionals?

- Will PMI offer assessments through a third party, e.g. the consultants to whom PMI has outsourced the Brightline marketing initiative?
- Is PMI planning for the company to whom PMI has outsourced the Brightline marketing initiative to follow the path of HSI, to be acquired by PMI so PMI can offer assessments and related consulting through a subsidiary?
 - And if so, first off, why that firm versus a dozen others?
 - Does PMI appreciate the risk that perceptions of cronyism represent to its interests?
 - Does that firm have any experience in assessing and developing strategy implementation capabilities, much less experience commensurate with leading firms in this domain?
 - How will PMI avoid having to decommission and write-off any company acquired for this role? What have we learned from HSI?
- What is PMI's product line strategy for Brightline?
- Given the intrinsic privacy issues, would PMI own users' assessment data or create derivative products out of it, and how would that be any different from ProductSuite?
- How does PMI justify undertaking any of these actions considering its so-called "strategy refresh?"

Responsibility

Per [Robert Kazanjian](#), "logics" are constructs that denote the rationalization of what an organization can do in the context of views about its purpose, legitimacy, and morality. I have posited that an organization's dominant logic dictates its ability to develop practical virtue in terms of value rationality and praxis; leaders give their adherents contextual cues that create meaning out of the ways they exercise power. I have argued that leaders thereby create the categories of action-taking to which adherents subscribe, per Foucault. Furthermore, I have argued that leaders can invoke value rationality in praxis by asking the questions of phronesis, per [Bent Flyvbjerg \(傅以斌\)](#). In this case, PMI's executives have cultivated a dominant logic punctuated by explicit cues that explain actions adherents have taken to expand operations outside of PMI's scope as a trade association whose mission should be to institutionalize project management throughout society, and in doing so PMI's executives are responsible for rationalizing competitive behavior that creates a conflict of interest between the trade association and those whom the trade association needs to institutionalize project management throughout society.

It would be foolish to deduce from this account that any of the people involved in the events of the past twenty years described above wished to do anything but what each thought was best for PMI. Yes, when we stand back and see the whole, it looks like a comedy of errors. But if we put ourselves in PMI's retiring CEO Mark Langley's shoes or in the shoes of those who advised him at each of these critical junctures, we should empathize. It is a classic example of local decisions that were sub-optimal solutions for a global problem. In my experience, that is typical of decision-making in many organizations, where important decisions are made by very few people in a

centralized manner. It literally happens to the best of us, and it is the bane of CEO's the world over, but if anyone can break this pattern and transform PMI, it's PMI's incoming CEO.

If PMI can transform itself, then it can enable the transformation of individuals, teams, companies, a profession, and society for the better. Whose responsibility is that transformation, and do the responsible parties agree that they are responsible? For that enormous purpose and awesome future, we must see the pattern (and recognize the enemy): PMI's commercialization. Promoting projects as the means whereby strategies are implemented, developing technical standards and ethical standards pertaining to that for practitioners, creating certifications in those standards and making those certifications robust and respected, and promoting these things through conferences, networking events, and educational materials is PMI's job. But in my view and in the view of many PMI members, offering other professional services or commercial products is not, e.g. services to help organizations with strategy design and implementation. As PMI's incoming CEO surely knows, [deciding what not to do is the essence of strategy](#). Making that distinction is the CEO's responsibility.

At this point, I would be remiss not to reiterate my failure in this saga, which I emphasized at the outset of this article. Despite years of dedication to PMI, hard work and collaboration with many other subject matter experts, and constant analysis and reflection over how best to work with and advise PMI leadership and management, I could not prevail over insularity and group-think. I could not change the direction PMI was going with OPM3, and I have been unable to get clarity from PMI regarding either its strategy refresh or Brightline, which appear to me to be working at cross-purposes. The source of conflicts is often expectations that don't match reality, and despite being endorsed by both PMI's CEO and PMI's Chairman for contributing greatly to PMI and immeasurably to the profession I have been powerless to dismantle provocative perceptions of these issues. Worse: through it all, I have been a spectator in PMI's resulting setbacks, which I view as my own failures too. Would that I could have foreseen how a vicious vacuum of values would cost PMI and PMI's stakeholders, that I could have enrolled PMI's CEO to distinguish the Project Management Institute from the institution of project management, that I could have somehow helped an emperor to have the wisdom of a king: a leader that would bring peace to the land by *invoking values* and *choosing courageously what not to do*.

“Would that I could have somehow helped an emperor to have the wisdom of a king...”

Appreciation

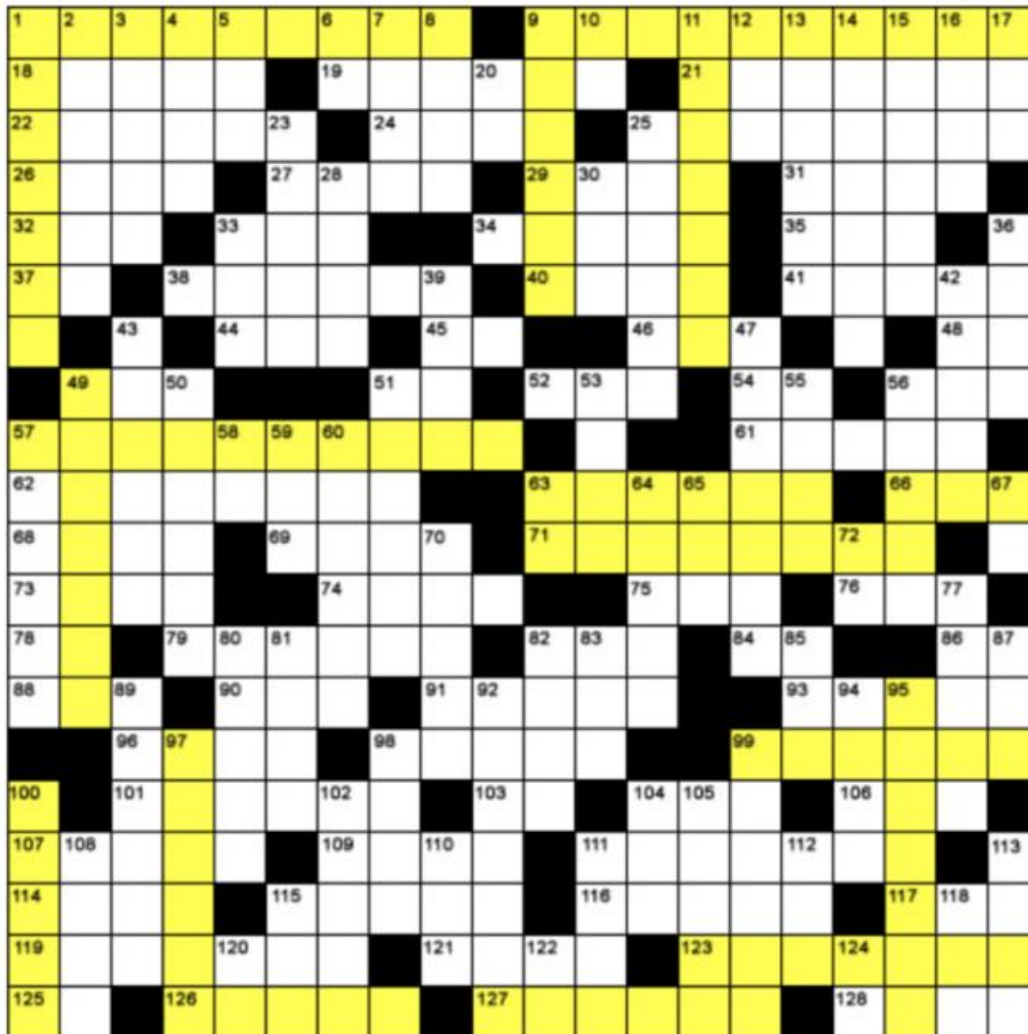
On a serendipitous note, I recently came across a [crossword puzzle](#) that I had not known existed until after I began writing this article (Figure 10). The PMI themed puzzle was created to thank Mark Langley for his years of service and featured seventeen PMI VIP's, including the founding five, some of the CEO's, and Fellows. PMI's retiring CEO Mark Langley is 49 down, and I am 9 across. It is somehow poetic that Langley and I would be entangled in a puzzle, which pretty much sums up our professional relationship of the past two decades. I join the puzzle's creator in thanking Mark for his years of service and I wish him well in his retirement. Kierkegaard wrote that “purity of heart is to will one thing.” In pursuit of the best possible version of PMI, our hearts have been nothing if not pure. For Mark's sake, for the sake of PMI, for PMI members, and mostly for the future of our profession, I hope we can solve the larger ontological puzzle that PMI and its

members find themselves in. We can do that by engaging in the questions of phronesis to cultivate the values of pragmatism, empathy, purpose, aspiration, coherence, wisdom, openness, discernment, clarity, accountability, prudence, usefulness, integrity, privacy, freedom, responsibility, empowerment, and appreciation — in that order. Pragmatism dictates that we start by creating empathy, which must be established before we can have a meaningful dialog about PMI's purpose amongst a diverse set of stakeholders whose views about PMI's purpose diverge in significant ways. Once all stakeholders are enrolled to a common purpose that touches, moves, and inspires them, we can have a meaningful conversation about what PMI should aspire to achieve. Aspiration and coherence go together. Any dialog about aspirations must involve dialog about coherence between PMI's purpose and PMI's aspiration, which must distinguish what PMI should do from what it could do (and distinguish what PMI should not do even if it could). These values lay the foundation for wisdom, which invokes dialectic regarding where we are going as a community, who gains and who loses (and by which mechanisms of power), whether it is desirable, and what, if anything, we should do about it. Wisdom comes with openness, as PMI must cultivate knowledge sharing between PMI's employees and the stakeholders who are not PMI's employees to engage in dialectic. Wisdom and openness predicate discernment, which engenders clarity and accountability. Once these are achieved, the values of being prudent and being useful can be cultivated. At that point, integrity is finally accessible as a reality that PMI's employees can create capably. This enables PMI to promote the values of privacy and freedom for its members, and to cultivate responsibility toward these ends. With these values in place, PMI's executives can focus then on empowerment of PMI's employees and PMI's volunteers to self-organize to advance PMI's purpose, and in turn create a culture of appreciation (Figure 1).

PMI's leaders and PMI's stakeholders should collaborate on elaboration of these values (Appendix B). We should do so on behalf of the disenchanting who have no words, the wonted who have no voice, and the hopeful who dream what is possible. But first, PMI's next CEO has an existential choice between two mutually exclusive alternatives: *doom PMI by trading its noblest aspiration of institutionalizing project management throughout society for more pedestrian ambitions that commercialize the institute in a spectacular failure of imagination, or lead PMI to create the profession most essential to solving the [wicked problems](#) facing [humanity](#) as an [exponential future accelerates toward us](#).*

PMI People

Puzzle by MPP



ACROSS

- 1. Female member of PMI founding five or watermelon smashing comedian
- 9. OPM3 program director 1998-2003 or Townhall.com alt-right columnist
- 18. Physician scheduling and messaging system
- 19. Pre-20th golf clubs or cuddles intimately
- 21. Stops
- 22. Putrid
- 24. Very small
- 25. False accusers

DOWN

- 1. PMI VP of Transformation or Billy the Kid slayer
- 2. Illicit love affairs
- 3. A metric unit of capacity
- 4. What land is divided into for purposes of sale?
- 5. Donkey (en francais)
- 6. Kind of school (abbr)
- 7. Saga or healthcare software firm
- 8. Popular kind of IRA
- 9. Member of founding five and first president
- 10. Swiss financial services giant (abbr)
- 49. Current PMI CEO or US AFB in Virginia

Figure 10: A crossword published this month thanks 17 people instrumental to PMI's growth, including both Langley and Schlichter. Here are the [answers](#) to this crossword puzzle.

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



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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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