

Alexander and the Indian King - Part 6 ¹

John Schlichter

If PMI's next CEO proceeded boldly to recast PMI's values in a way that prioritized institutionalizing project management by focusing exclusively on delivering only those products and services that PMI alone can furnish in its role as the premiere trade association for project management, the chief executive could expect to be celebrated like Alexander the Great upon cutting the Gordian Knot and fulfilling the prophecy that doing so would unite the world. This is the one thing everyone is waiting for a capable leader to address capably, and I have put so much effort into making this case because it breaks my heart that the institute's leaders have lost their way.

As stated at the outset, the popular story goes that Alexander encountered the Gordian Knot almost immediately after assuming his leadership role, much as PMI's incoming CEO is confronted by his own knot before the honeymoon has even started. An oracle foretold that the first person to dismantle the knot's intractable yoke would become the ruler of the known world. Alexander slashed the knot in two with his sword, conquered Persia and pivoted to India's subcontinent. One account goes that upon defeating an Indian king, Alexander asked the king how he wanted to be treated, and the king invoked the Golden Rule, replying "How would *you* wish to be treated?" In this scenario, the parallel is a PMI CEO that asks those who feel broken-hearted by PMI how they wish to be treated. Alexander was so impressed by the king that he returned his lands and title. The leader brought peace to the land by *invoking values* and *choosing courageously what not to do*. It was not essential to Alexander's purpose for Alexander to totalize the Indian king's domain, and Alexander relied on a clear value system that enabled him to make an immensely wise choice. An alternative history told by some Indians to this day is that Alexander was defeated by the king, inspiring Alexander to ask for a halt to hostilities. By that account, the Indian king agreed to his opponent's plea for peace, as that was the Indian custom, not only invoking the Golden Rule but embodying that value. It was not essential to the Indian king's purpose for him to harm Alexander, his remaining leaders, or anyone who followed him. The king relied on a clear value system that enabled him to make an immensely wise choice. In either case, whether the legacy belonged to an emperor or to a king, a wise leader brought peace to the land by *invoking values* and *choosing courageously what not to do*.

At the outset of this missive, I wrote therein lies a lesson for PMI's incoming CEO: true leaders base their decisions on clear value systems that enable them to focus on what is essential to their purpose by choosing courageously not to do things that are not essential to their purpose. That's a simple heuristic for PMI's CEO to check the endless ambitions of anyone's inner Alexander. If PMI's incoming CEO required PMI to reflect on PMI's essence, that should reveal PMI's essential purpose and function, i.e. that PMI's essential purpose is to cause every corner of society to take it for granted that project management is the way to solve society's wicked problems at all scales (and to solve the problems those solutions create), and that doing so requires that PMI's essential function is to distinguish grades of project managers based not merely on knowledge but

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competence (culminating in project managers on par with lawyers and doctors). That enlightened realization unravels the first layer of the Gordian Knot, which shows that *what matters most is the public's perception that professional project managers adhere competently to technical standards in an ethical manner*. That means the essence of PMI's purpose is an essential function that relies on only two essential actions: 1) development of technical and ethical standards that are vetted in practice, and 2) arbitration of certifications in those standards that signify competence and adherence. Anyone who realizes these things will experience enlightenment like a light bulb going off in his head. It is an "ah ha!" moment that simplifies everything.

It's why PMI doesn't need to get into the business of developing project scheduling software that others like Microsoft Corporation can do just as well or better than PMI. It's why PMI doesn't need to offer project management training that others like Emory University can do just as well or better than PMI. It's why PMI doesn't need to offer courses, certifications, or self-assessment products pertaining to *strategy design* that top tier strategy management consulting firms like McKinsey can do just as well or better than PMI. It's why PMI doesn't need to offer products or services pertaining to assessing Organizational Project Management (OPM) maturity or increasing OPM capabilities that others like OPM Experts LLC can do just as well or better than PMI. But here's the catch: neither Microsoft Corporation, Emory University, McKinsey & Company, OPM Experts LLC nor any similar company can lead and arbitrate development of the technical and ethical standards that predicate project management in ways that will permeate society and elevate project management competency certifications as effectively as PMI can. PMI is uniquely positioned to proffer project management certifications as respected as any adopted by paralegals and lawyers or paramedics and doctors. It is not essential to PMI's purpose for PMI to totalize any of the domains of any other company whatsoever to do that.

On the other hand, PMI will have a hard time creating and sustaining project management competency certifications without the support of the Microsoft's, Emory University's, OPM Experts, and McKinsey's of the world, which is why PMI should avoid competition like the plague, recognizing that competition exists whenever prospective customers view two providers as viable alternatives. Obviously, there's no reason to force the likes of Microsoft, Emory, McKinsey, and OPM Experts to combine resources to do the one thing they all want PMI to do (or to inspire them to join forces to prevent PMI from doing the things they do not want PMI to do). It is imperative that PMI's dominant logic of marketing Organizational Project Management (or strategy implementation through projects) not engender a culture of entrepreneurial adventurism outside PMI's essential purposes, functions, and activities. To guard against that, PMI's CEO should revive discourse on PMI's values in a manner that leverages what Berman says about P.R.I.C.E. per Flyvbjerg's guidance on phronesis without repeating the types of pitfalls PMI provoked with OPM3 (explained in previous parts of this missive).

As standards-bearers Alexander and the King probably held many values respectively that the other did not esteem with equal priority, but in both historical accounts summarized above the prevailing leader's actions followed the most ancient standard of ethics known to humankind, celebrated from ancient Egypt to ancient Greece, from ancient Persia to ancient Rome and India in ways that live on to this day. It is the fundamental ethic espoused in the Abrahamic religions, traditional African religions, East Asian religions, Iranian religions, and Indian religions. As such, it is globally the most widely esteemed ethic of all time. We know it as "the Golden Rule." As a Christian, the Golden Rule appeals to me personally and compels me to set aside ego.

In either reading, Alexander or the king demonstrated that gentlemen need not lose their honor in a fight if they do not confuse what they can do with what they should do. In the larger arc of this missive on project management empire, that wisdom extends from disagreements between individual executives (wherein one's quality is demonstrated by one's restraint) to strategic trade-off decisions regarding where not to compete (which luminaries like Michael Porter, Jack Welch, Jag Sheth, and countless others have repeatedly said is the most fundamental decision of corporate strategy, i.e. the trade-off decision that distinguishes what not to do). The larger lesson for PMI, however, is that viewing the world through the lens of *empire* is not an ethic any major civilization or religion esteems more than viewing the world through the lens of *ecosystems*.

The Project Management Institute is a trade association in the sense of an organization founded and funded by individuals and businesses that operate in a specific profession, namely the project management profession, which spans all verticals: trade associations are foremost ecosystems. An industry trade association participates in public relations activities such as advertising, education, political donations, lobbying and publishing, but its focus is collaboration between individuals and between companies (not competition with any of them). Trade associations like PMI may offer other services, such as producing conferences, networking, or charitable events. A common criticism of trade associations is that, while they are not "profit-making" organizations that claim to do valuable work which is ultimately for the public benefit, they are in reality fronts for price-fixing cartels and other subtle anti-competitive activities that are not in the public interest. Jon Leibowitz, commissioner at the Federal Trade Commission in the United States, outlined the potentially anti-competitive nature of some trade association activity in a speech to the American Bar Association in Washington, D.C. in March 2005 called "The Good, the Bad and the Ugly: Trade Associations and Antitrust." For instance, he said, under the guise of "standard setting" trade associations representing the established players in an industry can set rules that make it harder for new companies to enter a market. But there's a way that PMI can insure it need never worry about such criticisms: decentralize.

By decentralizing PMI's core functions of developing standards and awarding certifications, PMI can ensure that it reflects the wishes of its stakeholders, harnesses the collective wisdom of crowds, and creates the possibility of matching the exponential pace of change in ways that keep PMI standards and certifications relevant, inuring to the benefit of society at large. In my view, this strategy involves 3 G's: genesis, gamification, and governance. Genesis means recreating PMI by recasting values, deciding what is essential, and on that basis choosing courageously what not to do. That should result in hyper-focus on standards and certifications and fidelity between the two, while divorcing PMI from all complaints of competition or monopoly to date. Gamification pertains to a digital transformation of standards/certifications development and management, which will require PMI to create a new platform based on emerging technologies, i.e. a digital [decentralized autonomous organization](#). And governance means making that platform its own internal stand-alone business within PMI that serves all other aspects of PMI. PMI's incoming CEO should know that revolutionary ideas like these will not be brought to him by either the oligarchy or the hoi polloi and will never become a reality without the wisdom of Alexander and the King. [What do you want to be remembered for long after you and I are gone?](#)

Postscript:

Gamification is a Game Changer

Products and services that are non-essential to what makes PMI what it is should remain beyond PMI's remit, e.g. Brightline's prospective product to enable customers to self-assess strategy design capabilities. By contrast, products and services that improve PMI's ability to perform its essential functions should be perfected. Think about it. Should PMI's incoming CEO prioritize Brightline's nascent adventurism or should he instead prioritize fidelity between PMI's standards and certifications?

PMI is the largest professional organization associated with enabling individuals to become more professional in project management. PMI's primary standard is "A Guide to the Project Management Body of Knowledge" or "PMBOK Guide," which is the basis of PMI's primary certification, the "Project Management Professional" (PMP) certification. While there are over 6 million copies of the PMBOK Guide in circulation, only 871,000 people are certified PMP's. Why are there so many more consumers of the standard than persons certified in it? And the fact that there are only 528,000 members of PMI is another telling statistic. But even more arresting is the fact that PMI has earned over one billion dollars on PMP certifications to date, and PMI holds over fifty million dollars in reserve. With that much money in play, why can't PMI enroll more consumers of PMI's standards and certifications to see value in becoming PMI members?

Perhaps it is because too much power and too much value have become much too centralized. If that is true, and if creating standards that work which people truly use is essential to PMI's purpose, let's consider decentralizing the creation of standards and decentralizing the assessment of organizations who have adopted those standards. If it's essential for PMI to base certifications of individuals on what they are doing in real-life in real projects and to base certifications on whether what they are doing is working (which I think we can all agree is essential), how can PMI make that happen? My answer to that question is: make the whole thing a game.

Features

1. Self-organizing to create industry standards for any process.
2. Decentralized assessments of standards adoption, with credentialing or certifications as a byproduct of assessments.
3. Recursion: automatic feedback on efficacy of standards to update standards, i.e. learning what is and isn't being adopted or what does and doesn't work.
4. Gamification of these things, so you get points, especially for developing standards that others adopt and that are proven to work.
5. Earlier users get residual points from subsequent users.

6. Creation of a utility token that promises first access to the data created from all these things.
7. The ability to exchange points for tokens.

Scenarios

Prototype: 1) Develop web-based [platform](#), more specifically a [Decentralized Autonomous Organization or DAO](#), to co-create a documented process (draft standard) where multiple persons up/down vote content (e.g. Everipedia). Enable users to document steps for assessing adoption of that standard. 2) Record these to a blockchain. 3) Enable users to record assessment of the process's adoption in an organization, tying assessment records to the correct versions of a documented process. 4) Enable automatic identification of discrepancies between what the standard says and what assessed organizations are doing (and record to a blockchain). 5) Enable users to record names of persons involved in an assessment and issue certifications recorded in a blockchain. 6) Gamify everything. Create an app that issues points.

Creating a Standard and a Method to Assess the Standard

Five people (e.g. Mike, Bob, Erin, Andy, and Lola) create ABC standard for project estimating. It's called the ABC Project Estimating Process Standard, i.e. ABC-PEPS. Different people up vote and down vote the respective contributions that result in the ABC standard.

It starts by Andy proposing a process that would become a standard, e.g. stating that the project estimating process has 4 steps: a) identify project, b) estimate work hours for tasks, c) collect data on tasks, and d) report actual work hours against estimated work hours.

Andy proposes the roles involved in each step, e.g. a) sponsor identifies project, b) developer estimates work, c) manager collects data on tasks, and d) analyst reports actual hours against estimated hours.

Mike and Erin up-vote all steps. Bob up-votes the first two steps but down-votes the second two steps. Lola up-votes all but the third step. Lola proposes a change to step three. Everyone up-votes the new step three.

This satisfies a quorum, and the process is baselined (distinguished as an official version) with everyone endorsing all steps except Bob, who endorsed all but step four.

The baseline and the votes are recorded to the blockchain. It's like Wikipedia with content creation and up/down voting recorded to a blockchain. Actually it's more like Everipedia.

As part of that process, they also created an assessment protocol (set of steps) for assessing whether the process is being performed consistently, i.e. a “maturity assessment.” The protocol asks whether each step of the process is performed (yes or no?) on each project of an organization, whether these steps are performed consistently, whether the organization collects metrics on the process regularly, whether the organization has distinguished an acceptable range of variation for the process, and whether the process performs within that range. The assessment protocol and votes on it are recorded to the blockchain.

There may also be a protocol for an expert-assessor to assess the assessor’s assessment, i.e. quality assurance and quality control.

Assessing an Organization’s Adoption of the Standard

An assessor assesses an organization that has adopted the project estimating standard, i.e. ABC-PEPS Version 1.0. There is automatic version control between an assessment and the standard used for that assessment. An overall maturity level for the organization gets recorded to the blockchain, e.g. Not Implemented = Level 0, Performed Consistently = Level 1, Organization Measures Process Performance Regularly = Level 2, Process Is Performed Capably = Level 3.

The maturity score corresponds to a specific organization assessed with a specific version of a standard on a specific date by a specific assessor, involving specific people from the assessed organization who performed specific roles pertaining to the standard on specific projects.

These things are recorded to the blockchain: the organization assessed, the sponsor of the assessment, the assessor, the baselined standard used in the assessment, the persons included in the assessment (per the roles delineated by the standard), the projects evaluated by the assessor wherein those persons performed their role(s).

Feeding Assessment Results Back into Standards Creation

Discrepancies between the standard and what organizations are doing are routed automatically from assessments back to the standards recorded in the blockchain. This is important because it’s how we prevent standards from growing into massive phone book size monsters full of useless information. For example, if an organization is performing the process but doing step four of the process differently (or not doing that step), this information is recorded to the blockchain. Likewise, feedback on the assessment protocol would be recorded to the blockchain.

Granting Certifications as a Byproduct of an Assessment

As a byproduct of the assessment, all individuals involved in the assessment get certifications recorded in the blockchain. That is, the organization gets certified regarding the extent to which it has adopted the standard, and the individuals in the respective roles required of the standard get certified in those roles.

An individual’s certification is a function of the assessor’s evaluation of that individual’s

performance of a role in a standard adopted on projects of the organization that was assessed.

Individuals to be certified may be required to pass a quiz on the standard as well (i.e. knowledge), but the most important thing is that the assessor assessed that the individuals applied a standard and produced the intended result, i.e. competency. It all gets recorded to the blockchain.

Gamification - Awarding Points to All Participants

Everyone gets points for doing each of these things:

Mike, Bob, Erin, Andy, and Lola get points for creating a standard that, per verifiable assessments, has been adopted by a certain number of organizations. They each get points for accuracy corresponding to their up and down votes. If assessments show that most organizations adopt the first three steps but not the fourth, then Bob gets extra points (because he down-voted step four). It gets recorded to the blockchain.

The participants from an assessed organization get points for getting assessed, but only if they agree to let their assessment results be recorded to the blockchain.

You also get points for the actual performance of your projects. If you were on a project that was included in an organization's assessment, and you performed the estimating process, you get points if your estimates were accurate. But only if you agree to let it be recorded on the blockchain. This is required for an individual to earn a competency certification.

You get points for earning a competency certification (recorded to the blockchain).

The assessor gets points for performing an assessment (recorded to the blockchain).

An expert-assessor can go back and audit the original assessor's assessment. The expert-assessor gets points for that. It gets recorded to the blockchain.

Everyone who has earned any points will also earn derivative points from others who subsequently earn points. Because research shows humans like to be surprised with rewards, this may be designed to occur in an unpredictable way, i.e. variable response. It all gets recorded to the blockchain.

Making the Experience Sticky

Participants in any of these activities can track their progress via an app on their phone, which alerts them each time they get points. Ding! We want it to be fun (and addictive).

Everyone working on projects in an organization that is going to be assessed or has been assessed should have downloaded our app. It shows them how many points they've accrued and gives them opportunities to win more points.

We should have a website (like Everipedia) where standards are being created. It should also have other content created related to those standards. Users should be able to link collateral (e.g. user created videos) to standards, and those links should be up voted or down voted. Stars will be born. Once a link from a standard to a video, for example, goes viral and gets enough up votes, it could become "sanctioned" as a way for other users to get points for watching. What if clues were then embedded in sanctioned videos, and if you get all the clues and solve a puzzle with those clues you get tons of points? Ding!

You logged into our site every day this week? Congratulations, you got a point for that.

You invited 20 of your Facebook friend or LinkedIn connections to register on our site? For every 20 of those who have 100 or more contacts of their own (i.e. they're real people), you get X points. Or whatever. Ding! And hey, each one of those friends/contacts gets a point too.

Your project sponsor checks into our site? She will see your name and all the names of everyone on the projects she sponsors, and if she thinks you've done an extra special good job, she can click a checkbox next to your name. Points for you! Ding!

If your project sponsor checks "yes" when prompted by the question "Has <your name> estimated his/her work capably?" then you get huge points. Ding, ding, ding!

Your app prompts you with a project task estimating question using a PERT formula with a beta distribution. You select the correct answer. Points for you. Ding!

Your organization was assessed and you rated your assessor, who approved your rating (with the rating going into the blockchain)? Ding!

Creating a Utility Token to Develop the Ecosystem

A utility token would be created, promising token holders first access to information created from these activities. All the activities described above will create a lot of valuable information, i.e. the latest standards, who's certified, which kinds of organizations are doing what.

Points can be converted into tokens.

The creators of this system get a pool of points / tokens and retain seniority, earning derivatives on all subsequent points earned by newcomers.

A Digital Transformation of PMI Standards

Today the International Standards Organization (ISO) requires those bodies it endorses as developers of standards to develop their standards in a transparent and fair manner that ensures open consensus building. But one wonders how it assures that this occurs? One may note that organizations pay money to the ISO to be endorsed by ISO as accredited developers of standards, and that the ISO relies upon their customers' assertions of transparency and fairness, which the ISO takes at face value. Emerging technologies can improve trust in standards creation.

Blockchain could introduce full and immutable attribution not only of individual sources but of individual votes by individual persons to include specific content in a standard (both for and against), which could transform how an entity like ISO could accredit standards development. It could fundamentally change the nature of standards like PMI's "A Guide to the Project Body of Knowledge" (which is updated every few years by a cast of hundreds if not thousands of volunteers). It could also change how standards are published, extending to the decentralization of copyrighting.

Certified assessments of the adoption or application of a standard by an organization could be viewed as transactions that are reconciled to the original standard itself. Specific and immutable records of adoption of a practice (or failure to adopt a practice, as the case may be in any given third party assessment) could be embedded in the published standard dynamically, demonstrating whether the standard (or any part of it) is indeed a de facto standard. If these actions are structured as a game in the manner described above, then static standards will become hives of activity.

With data on usage embedded into the standard, we could see which parts of the standard are used most, i.e. Pareto. We could see which kinds of organizations and users use different parts of the standard, i.e. consumer segmentation. We could compare usage (or lack thereof) to performance problems, i.e. effect stratification. And we could update these and many other dimensions dynamically, refreshing the standard with value-added information in keeping with the real world. Importantly we could cause this updating to occur without the intervention, filtering, or meddling of powerful knowledge-brokers who should recuse themselves.

We can distinguish discrete knowledge from shared knowledge; demonstrate the extent to which any knowledge is shared; provide views of knowledge standards that are most relevant to different parties; and update knowledge-based standards automatically with usage data.

We can transform dumb paper standards into digital communities that are collectively intelligent cybernetic organisms. But first, PMI must check the dominant logic that is an inexorably totalizing drive to commercialize every stage of the value chain associated with professional services that enable strategy implementation through projects. *PMI must cleave from itself and terminate all entrepreneurial endeavors that other companies can do and re-focus all its energy on revolutionizing those things which only the premiere trade association for the profession of project management can do.*



Post-postscript

[Bold leadership is clarity around an unreasonable commitment to what should be.](#)

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

[Bernstein, Richard; 1984; “NIETZSCHE OR ARISTOTLE? Reflections on Alasdair MacIntyre's *After Virtue*.”](#)

[Chishtie, Farrukh; 2012; “Phronesis and the Practice of Science.”](#)

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[Foucault, Michel “The Ethics of the Concern of the Self as a Practice of Freedom,” in *The Essential Foucault*, ed. Paul Rabinow and Nikolas Rose; New York: The New Press, 1994 \[1984\]\), 25-42.](#)

[Flyvbjerg, 1991, “Aristotle, Foucault, and Progressive Phronesis: Outline of an Applied Ethics for Sustainable Development.”](#)

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[Madhav, Chandrakant; 2014; “Phronesis in Defense Engineering: A Case Study in the Heroic Actions of Two Defense Engineers as they Navigate their Careers.”](#)

[Papastephanou, Marianna; 2010; “Aristotle, the Action Researcher: A Review of Olav Eikeland’s *The Ways of Aristotle*.”](#)

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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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