

Interview with Roberto Toledo ¹

Member, 2020 Board of Directors
Project Management Institute



Interviewed by İpek Sahra Ozguler
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Introduction to interviewee

Roberto Toledo, MBA, PMP, is CEO and founder of Alpha Consultoria, SA, one of Latin America's leading project management training and consulting firms, founded in Mexico City in 1997. He is also founder and chief learning officer at Alpha PM Consulting, Inc. headquartered in Chicago, USA. Both companies have trained more than 30,000 executives and has received two PMI professional awards, the first in 2009 and another one in 2011.

Mr. Toledo has been a speaker at forums in 17 different countries in the Americas, Europe and the Middle East. Since 1996, he has been part of the faculty of Mexico's Institute of Technology (ITAM), where he currently heads the Master's Certificate Program in Project Management, and lectures at the graduate level on project management and strategy execution. He is also an instructor with the Inter-American Development Bank.

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An active PMI volunteer for more than 12 years, Mr. Toledo served on the PMI Educational Foundation's board of directors from 2012 through 2016. He was chair of that board in 2014. Previously, he held different leadership roles in the PMI Mexico Chapter. He graduated from the Leadership Institute Master Class in 2012.

Mr. Toledo holds an undergraduate degree in architecture from Iberoamericana University (UIA), an MBA from ITAM, is a Certified Company Director with the Institute of Directors of the United Kingdom and has been a certified Project Management Professional (PMP)® since 2002. He was born and raised in Mexico City, then moved with his wife and three sons to the Rio Grande Valley in Texas, USA for five years, until 2015 when they came back to Mexico. Mr. Toledo speaks Spanish, English and conversational Portuguese and devotes all his spare time to his family and playing golf, even though he is not a very good player.

İpek Sahra Ozguler (Ozguler): Roberto Toledo, thank you for accepting the interview invitation of the PMWJ. Please tell us about yourself for PM World Journal readers get to know you.

Roberto Toledo (Toledo): I was born, raised and currently reside in Mexico City. I have lived here my entire life, except for the five years I lived in Texas. My wife and I have three sons, and we just celebrated our 25th wedding anniversary, which was a major milestone for us.

I am the Managing Director, CEO and Founder of Alpha Consultoria, a project management training and consulting company, founded in 1998. We started as a small company and today have more than 40 employees. I have been fortunate to be able to run this company for more than 20 years and have worked with great clients along the way.

Project management is work I am passionate about. I first got involved with PMI around 2000, but it wasn't until 2006-2007 when I decided to volunteer for the Mexico City chapter. I have been a senior volunteer for the last 10 years, including five years with PMI's Educational Foundation Board of Directors, and three years with the PMI Board of Directors.

Ozguler: As CEO of Alpha Consultoria, one of Latin America's leading project management training and consulting firms, the mission is to enhance the company's abilities and knowledge, thereby increasing productivity and performance in the projects. How do you achieve this?

Toledo: For over 20 years, we have been consulting and training individuals and organizations on project management techniques, not only in Mexico but across Latin America. This has been the foundation of our company and it is still the core business that we perform today.

Over the last six or seven years, we have expanded our services and now provide project management training and consulting services across all methodologies. We are also involved in business analysis, strategic planning and other services organizations need in order to implement their objectives and strategies.

We have always made a case to work with our clients, not only to help the project managers become better at doing projects, but to also help the organization achieve its objectives. We strongly believe that project management is the key organizations need in order to implement their strategies and achieve the vision they foresee. By using more efficient and effective project management methodologies, we help them achieve those objectives. We believe that when organizations have a more streamlined and structured process in order to perform, they will be much more productive in providing value to their clients.

Our work is twofold – we need to develop the processes and procedures used to complete the project, but more importantly we must develop the people. This is what we try to accomplish with our clients, either through training the people from the organization, training the different team members on the project, or helping the organization develop their own project management culture.

Ozguler: Additionally, you're a Chief Learning Officer at Alpha PM Consulting. What are the key duties of the CLO?

Toledo: In 2011, I started a subsidiary of Alpha Consultoria in McAllen, Texas, Alpha PM Consulting, to cater to the U.S. market.

In 2016, I returned to Mexico City because there were a variety of projects happening that I personally wanted to direct. So, I handed over the management of Alpha PM Consulting to Mrs. Perla Castro—a project management expert and a long-time professor at Northwestern University—who now works side-by-side with me to deliver our training services in the U.S.

While Perla moved the company to Chicago, I still have a role within the organization – the Chief Learning Officer. This means that every project management course we offer is based on content that I developed. The courses we offer in the U.S. are very similar to what we offer in Mexico and the rest of Latin America, however, there are differences based on the needs of the market.

Ozguler: You're currently on the PMI board and responsible for strategic planning. Can you elaborate on this, on your role and what exactly you do regarding strategic planning?

Toledo: The PMI Board of Directors is composed of twelve different directors. We are a collective, governing body that make decisions and review the organization as a team. There are specific titles and roles within the Board that specific directors perform. Each year we conduct an internal election within our group to select the person that will serve

as the chair of the Board. They are responsible for coordinating the team and representing the organization.

We also elect three other chairs each year for the Audit Committee, the Compensation Committee, and the Strategy Oversight Committee. In 2019, I had the opportunity to serve as the Chair of the Strategy Oversight Committee.

The role of the Chair of the Strategy Oversight Committee is to coordinate a team of up to three directors and work side-by-side with the Strategy Team within PMI. PMI has a very experienced team of individuals who are responsible for developing the organization's strategy. Through the committee, we support the definition of the Institute's strategy and our staff team turns that strategy into actionable objectives. The other role of the Strategy Oversight Committee is to oversee that this process is carried out thoughtfully.

One additional job the committee has within PMI is to maintain conversations regarding the future of the global organization. We are at the forefront of strategy development within the Board of Directors and our duty is to see that there are always conversations taking place to analyze what's to come for us as a profession, and as an organization.

Ozguler: Last year the PMI brand was refreshed. Why was the brand refreshed?

Toledo: There was a lot of talk about the change of the PMI brand. It was a major rebrand. This is not the first time we changed the graphic image of the organization, however. We have come a long way in 50 years as an organization and a profession.

As PMI approached its 50th anniversary, we decided it was time to make a change to the brand and to the message we project to the market, profession, and to the different organizations we work with. As an organization, we had used the anniversary to reflect on past learnings from great past projects with our Most Influential Projects list, and spring forward with new ideas. There was no better time to also reflect on our brand.

We are facing a completely different market in terms of projects, methodologies and frameworks used within project management. So, we wanted to make a change in terms of how the market sees PMI and show a new, refreshed face towards our constituents.

We decided that this change needed to be more radical than those previous. When we redefined the brand, one important factor to us was becoming more attractive to younger generations. Based on our statistics and what is widely known in the marketplace, our organization is very attractive to older generations—for instance, Baby Boomers—but not as attractive to Millennials and Generation Z.

We wanted to change our brand to be more representative of all.

Aside from being a 50-year-old organization, we are a bright, passionate, vibrant organization that cares for the work that people do in terms of delivering outcomes. We worked very closely with consultants to develop content, a graphic image and a language

– something that is more than just a logo – to construct a brand that is new, impactful and appealing to all generations.

Looking at the branding itself, there are 10 unique symbols that make up the language of The Project Economy, and we've used these symbols to create a consistent design language that represent some of the characteristics – collaboration, determination, change and innovation, for example – needed to be successful in the future. We've also incorporated new colors – tangerine, aqua and violet – into the brand to represent our bright, fearless and nurturing personality.

Around the world, practitioners expressed their excitement as this was a catalyst for what we can produce as an organization. This is a brand that speaks to the minds of different generations and is becoming distinctive of our organization.

Ozguler: What will project management trends be in 2020?

Toledo: One trend we will continue to see in 2020 is the use of the methodology that works best to get a project done. With larger organizations now tapping into Agile practices, the need for a framework that is scalable is important. Organizations feel attracted to Agile methodologies – *Pulse 2020* data listed Agile as the top factor for organizational success, according to executives – but still need to work with predictive frameworks, too. Most successful organizations around the world are using both methodologies with a holistic approach by being practical in terms of what has a better use for the outcome they want to produce.

Another trend that will continue to develop is the use of artificial intelligence in project management. According to [2019 Pulse In-Depth data](#), 81 percent of project management professionals reported their organizations are already being impacted by AI technologies.

There will be a rise in the use of software, customer care platforms and simulation tools that will all incorporate the benefits of artificial intelligence. For example, this year we may start seeing the first widespread use of a scheduling software that includes artificial intelligence, but in a more automatized way that adheres to the needs of different projects. Another example I always refer to is the construction industry – you have building information and modelling tools being developed that are changing the way we plan and control construction projects. We will see more of an integration between these technologies and project management technologies in the coming years.

Ozguler: According to your opinion, what skills and competencies does a leader have to be successful in the future?

Toledo: Recently we have seen the need for project managers to become more technologically savvy and more digitally experienced. PMI calls this “digital skills.” As project managers, we need to be more aware of the different technological and digital tools that are available so we can leverage them in our work. But we must also know how to make use of these technologies to be more efficient and effective on the projects we are managing to make outcomes more closely aligned to the customer's needs.

Project managers must also have the ability to adapt to new technologies and other workplace changes. In fact, more than half (53 percent) of organizations surveyed in our [2020 Pulse of the Profession: Ahead of the Curve: Forging a Future-Focused Culture survey](#) said they place a high priority on building a culture receptive to change.

In the project management profession, one thing that separates a good project manager from a bad project manager is the use of his or her power skills, or soft skills – for example, leadership, negotiation, conflict management or conflict resolution.

The most important skill, however, is being able to make good use of our emotional intelligence. We must understand how we react to others, how we adapt to others, how we react to conflict, and how we can influence and motivate those on our teams.

Ozguler: What is your daily routine? What do you do from 9-5?

Toledo: Between PMI and Alpha Consultoria, I travel often. When I am not traveling, however, I try to be at home as much as possible. I usually wake up around 5:00 a.m. and like to prepare breakfast for my wife and kids. I leave my home around 8:00 a.m. to head to the office, where I typically spend most of my day if I am not visiting client sites. I visit my clients often, whether I am in the process of selling services or supervising the work we are doing. I stay at the office until around 6:00 p.m. before heading home to spend time with my family. Since I wake up so early, I tend to go to bed a bit earlier, too.

On weekends when I have time to myself, I enjoy playing golf. I'm always excited to play because I get out of the city for a bit.

About the Interviewer



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Ipek Sahra Ozguler graduated from the Istanbul University, Turkey with a Bachelor of Science degree in Computer Engineering and from Middle East Technical University, Turkey with an MSc degree in Software Management. As a project manager, she has more than 13 years of experience in various areas such as portfolio management, program management, project management, software management, business analysis. She became a certified PMP in 2012 and a certified SCRUM Master in 2014.

She has gained broader insights in a variety of projects across manufacturing, defence, FMCG (Cola Cola), insurance (Euler Hermes), audit (Deloitte), telecommunication, aviation and finance sectors. In addition, she has been working as an international correspondent for the PM World Journal since 2014.

Ipek is the creator and editor of the highly acclaimed book, [The Perspective of Women Project Management Professionals](#), interviews with leading female PM experts and professionals around the world. The book was published in March 2020 and is available [here](#).

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