

## **Towards extending the scope of project-related management to help address climate change and other global problems<sup>1</sup>**

*By Alan Stretton*

### **INTRODUCTION**

This article has been stimulated by Pells 2021: *Project management needs a higher purpose!* In particular, I want to start discussions on one of the key questions posed by Pells with regard to global crises and related issues – “*But how can PM [Project Management] really help get important things done?*” (p.9).

I will first propose an embryonic framework with a basic list of possible global problem-solving facilitation processes, and with a broadly aligned group of PM-related services which derive from previous articles. This is followed by a more detailed discussion of possible contributions by the latter to the global-related facilitating processes – which are substantial – and then of some impediments to actually implementing them. It is contended that the latter are also substantial, but are exacerbated by a pervasive product-orientation within the project management avocation, and by its failure to define the nature of its business in terms that suggest its relevance to resolving wide ranges of problems, including major global issues. Possible approaches to facilitating such a paradigm shift are tentatively suggested.

### **AN EMBRYONIC FRAMEWORK OF POSSIBILITIES FOR PROJECT-RELATED MANAGEMENT TO HELP RESOLVE KEY GLOBAL ISSUES**

#### **Possible global-issue facilitating processes**

It seems to me that perhaps the most obvious ways in which project management (PM) could help resolve important global issues are through the following range of what I am going to label as global-issue facilitating processes:

- Involvement in clarifying what the important issues are, and the desired results;
- Involvement in deciding the initiatives that will best help achieve those results;
- Specifying the requirements of these initiatives and their component projects;
- Undertaking or overseeing the management of these projects etc.;
- Working with users of project outputs to help them achieve the desired results.

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But, just how well prepared is project management to offer such a range of processes? We will first look at some of the many different ways in which project management, and extensions to it, are currently practised and/or discussed.

### **Project management (PM) pluralism: A PM-related categorisation**

There are many different formats in which project management (PM) is perceived and practiced. In Stretton 2020h I identified the following categories of project management, and extensions from them. These are arrayed vertically in order of the increasingly broader scope of their activities, as I identified them in the context of their contribution to organisational strategic management.

- Project execution/delivery
- Project development and execution/delivery (incl. MOP, Agile)
- Strategic initiative management support added (incl. FEL, CND, project choice)
- Strategic planning support services added (incl. helping shape org. strategic objectives)
- Others

I will be discussing these in more detail shortly, as we explore some parallels between the above project management (PM)-related categories and the earlier list of facilitating processes, as now summarised.

### **Aligning PM-related categories with possible relevant facilitating processes**

In Figure 1 below, I have changed the order of the above PM-related categories to their broadly corresponding facilitating processes.

<b>PM-related categories</b>	<b>Possible global-issue facilitating processes</b>
<ul style="list-style-type: none"> <li>▪ Strategic planning support services added (incl. helping shape org. strategic objectives)</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Involvement in clarifying what those important things are, and the desired results;</i></li> </ul>
<ul style="list-style-type: none"> <li>▪ Strategic initiative management support added (incl. FEL, CND, project choice)</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Involvement in deciding what projects etc. can help achieve those results;</i></li> <li>• <i>Leading specification of the requirements of these projects etc;</i></li> </ul>
<ul style="list-style-type: none"> <li>▪ Project development and execution/delivery (incl. MOP, Agile)</li> <li>▪ Project execution/delivery</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Undertaking or overseeing the management of these projects etc.;</i></li> </ul>
<ul style="list-style-type: none"> <li>▪ Others? [Involvement in achieving outcomes, realising benefits?]</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Working with users of project outputs to help them achieve the desired results.</i></li> </ul>

**Figure 1: An embryonic framework - Aligning PM-related categories with facilitating processes**

We now discuss each of the aligned groups in more detail, in the vertical order shown in Figure 1. We will look particularly at opportunities that appear to exist to extend the range of PM-related categories to be more fully involved in global-issue facilitating processes. Later I will discuss impediments that appear to stand in the way of such involvements.

## **DISCUSSION OF POSSIBLE CONTRIBUTIONS BY PM-RELATED SERVICES TO GLOBAL-ISSUE FACILITATING PROCESSES**

### **Strategic planning support services > *Potential global-level involvement***

The “added” appended to strategic planning support services simply means that these have been added to the increasing diverse scope of project-related management services listed below it in Figure 1.

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Stretton 2020h discussed how external strategic planning support services helped client organisations establish and/or shape their organisational strategic objectives. It exemplified two types of organisations which have provided such services. The most prominent of these are EPC (Engineering, Procurement, Construction) organisations, and I quoted from Prieto 2009, who says that owners often need partners to help them translate their “programmatic vision and broad objectives into a well defined set of specific business objectives” (SBOs). EPC organisations are most prominent in the fields of large complex projects, and mega-projects.

My old employer, Civil & Civic, also occasionally became involved in helping clients establish SBOs. In an earlier article I quoted from Clark 2002:93, where we helped an educational institution in Sydney, Loreto Convent, Kirribilli, “....come up with an integrated business plan for the school’s complete rebuilding and expansion – supported by the first structured finance plan in the Catholic education sector”.

I also noted that these types of services are well beyond the range of conventional project management organisations. Yet this is an important service which many organisations have developed to cater for unfulfilled needs in certain market areas.

So, the question is, can such services be extended to involvement in clarifying what the important global-related issues are, and the desired results? I don’t know, but suspect that there may well be some scope. This is because so many of these global issues are clouded by political populism, with its propensity for offering unworkably simplistic solutions to complex problems. On paper at least, appropriate extended PM services could well have a role to play in helping refine the problems in ways which bridge gaps between simplistic perceptions and complex realities.

EPC organisations would appear to be particularly strongly placed to offer such help. Someone like Bob Prieto, late of Fluor, who has also had even wider global involvements including chairing committees at the World Economic Forum, would be exceptionally well placed to comment on such possibilities.

**Strategic initiative management support services > *Involvement in choice of projects, and/or specifying their requirements***

***The nature of strategic initiatives***

I have adopted Cooke-Davies 2016:259, definition of strategic initiatives (which he quotes from a 2013 PMI *Pulse of the Profession In-Depth Report*), as follows:

The report defined a strategic initiative as ‘a project, portfolio of projects, other discrete programme or series of actions undertaken to implement or continue the execution of a strategy, or that is otherwise essential for the successful implementation or execution of a strategy.

I have used the label *strategic initiatives* instead of *projects*, because the latter usually need to be augmented by non-project inputs to facilitate the achievement of end results. I discussed this in some detail in Stretton 2019a, under the heading of *other strategic work*. The latter is included, along with component projects, in the broader category of *strategic initiatives*.

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We now expand on some of the types of component services that may be included in strategic initiative management, as summarised in the left hand text box.

***FEL – Front End Loading***

Morris 2013:60 describes FEL as follows:

IPA [Independent Project Analysis], the oil, gas and minerals project benchmarking company, coined the useful term ‘Front-End Loading’: ... (FEL) is a tool for determining which is the “right” project to meet the needs of business. The FEL tool assesses the level of definition of a number of critical items that are used to determine what, if any, asset should be built to meet a particular business need.

Front End Loading (FEL) services are widely deployed in large complex projects, notably by EPC (Engineering, Procurement, Construction) organisations. In overall monetary terms they represent a significant portion of the totality of project-related activity.

**CND – Client Needs Determination**

I have discussed Client Needs Determination (CND) as practiced in Civil & Civic from the 1960s in many previous articles in this journal, starting with Stretton 2013e. I noted that this extended project-related service was actually a dual process of first, helping client organisations clarify their strategic business needs, and then helping them develop the most appropriate strategic initiatives – and thence projects – to best help satisfy these needs. These types of extended services developed naturally in Civil & Civic in response to recognising that many client organisations needed help in establishing or clarifying their strategic business needs, and/or appropriate strategic initiatives to best help satisfy these needs.

**Involvement in project choice**

Both the above types of component services in this category include involvement in choosing the component projects of strategic initiatives, as well as other strategic work.

So, the overall question is, can the above types of services be extended to involvement in deciding what projects etc. will best help achieve global-issue results; and in leading specification of the requirements of these projects etc.?

The rather obvious answer is “Yes”. This would appear to be a natural extension, particularly with FEL services, which are already so widely used on large complex projects in resource industries and the like.

It is also noted that FEL and CND services are beyond the range of “conventional” project management services. None-the-less, they are quite widely used extensions, into what I have described as strategic initiative management, so they appear to be totally appropriate techniques to apply to relevant global-issue problems.

**Project development and execution/delivery; Project execution/delivery > Undertaking or overseeing the management of these projects etc.;**

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There is, of course, a one-to-one correspondence here. However, a couple of comments on each of the components of the PM-related categories appear to be in order.

### ***Project execution/delivery***

Whilst, in the eyes of very many within the avocation, project management includes much more than just execution/delivery (as briefly discussed below), the latter is still very prominent in practice. This appears set to remain the case, particularly in the Covid-19 era, when many governments are likely to accelerate infrastructure projects to help overcome some of the economic consequences shut-downs due to the pandemic – and are likely to continue using the execution/delivery method of implementing these.

In a parallel context, Dalcher 2016 makes the following observation

Indeed, project management is regarded as an execution discipline concerned with realising plans. In the UK, especially in government circles, there is currently a growing emphasis on strengthening the profession of *project delivery*, implying that project management as practiced is an implementation-focused approach.

It is interesting that Dalcher should point to an increasing use of a descriptor like *Project delivery professional* to describe the project execution/delivery perspective.

This says a lot about external perceptions of the nature of project management. I believe this is a major factor impeding the extension of project management into broader fields such as global problems. I will have more to say about this in a later section on opportunities and impediments.

### ***Project development and delivery***

First, it is noted that MOP in the left-hand text box is shorthand for what Peter Morris has been calling the *Management of Projects* for some decades. I prefer the descriptor project development and delivery because it more explicitly describes what is involved in this category, which adds management of project “front-ends” to execution/delivery.

This category was in fact, was my first introduction to project management some sixty years ago. I have never really regarded delivery-only as truly project management. This is because many of us found, so long ago, that the potential for project management to add value is far greater in the “front-end” development and design stages of a project than at any time later.

Whilst project management has becoming more widely involved in front-end activities, particularly with Agile and similar iterative approaches, it is still the case that large numbers of often very large projects, including so many of the infrastructure projects mentioned above, still use delivery-only approaches.

There is therefore a strong case for project management to push for such projects, and for global-issue projects in the context of this article, to be project managed in the development and delivery mode.

**Involvement in achieving strategic outcomes, realising benefits > *Helping global-level users achieve results***

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There are some materials in the project management literature on project management involvement in achieving outcomes and realising benefits, but a good deal of it appears to apply only to very special cases (although the latter is seldom acknowledged). By and large, as I discussed in Stretton 2020e & 2020i, project management seldom has such involvement. The achievement of outcomes and realisation of benefits are in the hands of the users of the outputs from projects and other strategic work – and the users are only very occasionally project management.

However, where we have strategic initiative managers appointed (or have expanded the role of project management to embrace strategic initiative management), working with users of project outputs to help them achieve the desired results becomes part of the ambit of such managers.

Therefore strategic initiative management can have an important facilitating role to play if involved with helping resolve global-issue problems.

**DISCUSSION OF OPPORTUNITIES AND IMPEDIMENTS**

From the above, there certainly appear to be real opportunities for project-related management services to contribute in a more direct way than it currently does to helping solve major global problems. These days I am not close enough to the action to be in a position to make more informed judgements, particularly at the first and broadest level discussed above.

However, I am in a position to make a different type of judgement, this time in relation to impediments to achieving these wider contributions. I have little doubt that one of the main impediments lies within the project management community itself. I propose to

illustrate two strongly related impediments by quoting from one of the most widely publicised articles from near the middle of the last century.

### **Levitt's *Marketing Myopia***

Some sixty years ago Theodore Levitt (1960) published an article entitled “Marketing Myopia” in the Harvard Business Review, which turned out to be one of the most prominent contributions to the business world in the 1960s, and beyond. I was one of many whose perspectives were very substantially influenced by its main message. It is one of those timeless contributions whose fundamental message appears to be as relevant today as it was when published. I believe it is also highly relevant to the project management community – and in many contexts, including the global issues being discussed in this article.

But, first let us look at one of the examples of marketing myopia which Levitt discussed, under the heading “Fateful Purposes”.

***The US railroad industry example:*** Levitt indicated that the US railroad industry had been in decline for a long time, particularly by comparison with its glory days in the late 1800s and early 1900s.

Thus the railroads did not stop growing because the need for passenger and freight transportation declined. That grew. The railroads are in trouble today not because the need was filled by others (cars, trucks, airplanes, even telephones), but because it was not filled by the railroads themselves. They let others take customers away from them because they assumed themselves to be in the railroad business rather than in the transportation business. The reason they defined their industry wrongly was because they were railroad-oriented instead of transportation-oriented; they were product-oriented instead of customer-oriented.

I am going to suggest that project management may well be in a similar situation to that of the US railroads at the turn of the 20<sup>th</sup> century. Project management is similarly well established, and also has a very strong product (project) orientation – which, for whatever reasons, it is largely unaware of.

### **Project management needs to change from a product orientation to a customer/market orientation**

I have written about this from time to time in the past (starting with Stretton 2009h), and have discussed it with many colleagues. However, most project managers simply do not comprehend the extent to which they are pre-occupied with their product – their projects – at the expense of a more holistic perspective of where they stand in the broader contexts of the environments in which they operate. And I have been conspicuously unsuccessful in changing their perspective.

This product orientation is also reflected in the dominance of project execution-delivery perceptions of the nature of project management within the industry, as reflected in the

project management literature, and in the primary concerns of its representative associations and institutions, and of many of its supply organisations.

With regard to the latter, let me quote what the CEO, and later chair, of Lend Lease had to say (from Clark 2002:92).

‘On the business side, I suppose what has made [the Lend Lease group] different (and very successful)’ he told an interviewer in the early 1980s, ‘is that our approach has always been to seek out what the marketplace wants. Most companies tend to be product-oriented. We are not like this. We seek the marketplace needs and then design a product to suit this need’.

But, above all, the perception of the outside world is that project management is all about project delivery management. This is perhaps the strongest possible impediment against global-issue decision makers even thinking about looking to project management for the types of help we have been talking about here. Perhaps initiatives from the likes of the World Project Management Forum might succeed in overcoming this impediment, but it seems to me that its chances of doing so are minimal, at least while it defines itself in terms of its product. What appears to be needed is for the project management avocation to redefine itself in terms of the perceived circumstance and needs of its customers and/or marketplace.

## **What is the project-related equivalent of railroad’s transportation business?**

### ***Strategic facilitation business?***

I do not have a ready-made label to describe a project-related parallel to Levitt’s broader transportation business. My best effort to date is to describe it as a *strategic facilitation* business (using *strategic* in its broader context, rather than specifically organisation-related). I am not particularly enamoured of this label, but it seems to be at least on a par with other descriptors I have seen, which include the following.

### ***Integrating management business?***

I first came across specific discussion about “*Integrating Managers*” in the general management literature, in Mintzberg 1979:165, in which he quoted from Sayles 1976, as follows.

Integrating managers may be brand managers in consumer goods firms, responsible for production and marketing of particular products; project managers in aerospace agencies, responsible for integrating certain functional activities; unit managers in hospitals, responsible for integrating the activities of doctors, nurses and support staff in particular wards; court administrators in governments who “tie together the diverse and organizationally dispersed elements that make up the criminal justice system - ....”.

This is a very wide-ranging descriptor, and would also appear to be appropriate to the context of involvement with helping resolve global issues, where the inputs of a variety of different specialisations would need to be integrated to maximise their effectiveness.

### ***Other descriptors?***

In a somewhat similar context to the above, in Stretton & Crawford 2011 we borrowed the descriptor *Synthesists* from Tow & Gilliam 2009, which has much the same meaning as *Integrators*. Other possibilities I have seen are *Amalgamator* and *Coordinator*.

I do not find any of the above labels all that satisfactory for redefining the product-oriented project management business into a more user-friendly customer/market-oriented descriptor. I am inclined to favour *strategic facilitation*, but would hope that someone finds a better descriptor.

In the meantime, I conclude this section with a quote from Dalcher 2019.

To become influential, project management needs to consider the ability to integrate, extend and develop strategically in order to address wider organisational and societal concerns. To shrink the focus of interest would be an unforgivable error. ....

The profession is ready for a step change in how projects are described and positioned.  
.....

The concluding question is, “Are we really ready to make such a step change?”

### **SUMMARY**

This article first proposed an embryonic framework for discussions on extending the scope of project-related management to help resolve global problems. I adopted the descriptor *embryonic* very deliberately, to indicate that this only represents what I would see as the beginning of the development of a much more substantial and representative framework, to facilitate more focused discussions and agreed actions to achieve cohesive and appropriate engagement with global challenges.

The second part of this article discussed what I have long seen as an impediment to wider involvement by the project management community, which is its pervasive identification with the products – i.e. projects – which it produces, rather than any corresponding identification with the users of its project outputs, and with helping them achieve their own objectives.

It seems to me that we need a major paradigm shift to move the avocation from identifying with the product it produces, to identifying with facilitating the achievement of users’ needs. This is undoubtedly easier said than done. However, we already have some project-related sectors such as EPC organisations which have long since moved

some distance along this track. Hopefully, their work may inspire other sectors to make similar moves.

But, to be successful in making such moves, I believe that we need to move away from describing this aspect of our business as project management, towards a descriptor which gives others a better understanding of the broader nature of our extended services. I made some tentative suggestions, of which a *strategic facilitation* label appears to be the most appropriate, at least until someone comes up with a better descriptor.

I conclude on a personal note. In spite of the fact that I am reasonably well known as a contributor to project management in various ways, I have never described myself as a project manager. One reason is because I have also contributed in other areas – some managerial areas such as the R&D and educational domains, and other more specialist areas such as organisational strategic planning, estimating in the context of tendering/bidding for construction contracts, direct educational efforts, and writing many articles, such as this one.

Another reason is because I have seen my main contribution in my working life (and beyond) as helping people build on their strengths. One of my adult grandsons likened me to a gardener, providing the most appropriate environment I could for plants to grow and thrive. I rather like his simile/metaphor, and suggest that it may have some relevance for the project management community at large, in the context of its contributing to the resolution of the kinds of global problems which are the subject of this article – and, of course, to other types of social and similar issues closer to home.

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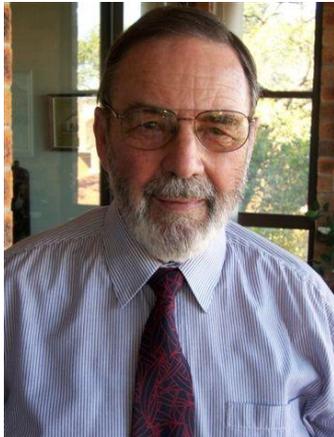
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