

## Do organisational project management practitioners have a higher calling/purpose in life? <sup>1</sup>

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### BACKGROUND

It seems that a recent editorial by the Editor of PMWJ (Pells, 2021) with the title: *“Project Management needs a Higher Purpose Part 1: Introduction, the Perfect Storm, Crises & PM”* published in January 2021 has really struck a sensitive nerve looking at the responses from various authors in PMWJ of February 2021. I expect that the editorial by Pells (2021a): *“Project Management needs a Higher Purpose Part 2: Mission Statements, Social Responsibility and the Rogue Black Elephant”* published in the PMWJ in February 2021 will have similar responses. Pells (2021) asks the following questions:

- What is project management actually for?
- What is our contribution to the world?
- What should it be?

Pells (2021) then answers that he thinks the purpose of project management should be to advance positive change in the world and he further states that it should be about more than making money, developing models and standards, or even educating project managers. Pells (2021) states that perhaps the most significant thing that he has realised this year is the overwhelming importance of programmes and projects coming first before project management (perhaps). Pells (2012) clarifies that projects, outcomes, and benefits matter more to most stakeholders than project management methods, processes, standards, knowledge, experience, and leadership. Pells (2012) concludes Part 1 of his editorial of four parts with the following statement: *“I think project management needs a higher purpose”*.

As a semi-retired organisational project management practitioner, I tend to agree with the editorials by Pells (2021 and 2021a) and with the recent articles and letters that responded to the first editorial published in January (e.g., Abuya, Young, Minelle, da Silva Neto, and Stretton (2021)). When I had to retire from my permanent job when I reached the age of 65 at the end of 2018, I decided that I would like to reflect on my career as an organisational project management practitioner and published some opinion articles which I have done (Smit, 2019 & 2020). Last year I wanted to write a short article to share my opinion on what I think the **calling** of organisational project management practitioners is. I have not done so as my wife and I are really enjoying our retirement by travelling and enjoying the beautiful Southern African nature (of course within the regulations of Covid-19). The editorials by Pells (2021 and 2012a) have now inspired me to write this article and share my opinion on the question: *“Do organisational project management practitioners have a higher calling/purpose in life?”*. In this article I also share a

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high-level a portfolio management model that organisational project management practitioners can apply to execute organisational strategies in order to deliver sustainable business value for organisations.

**KEYWORDS:** organisational project management practitioners, calling/purpose, execution of organisational strategies, business value, benefits, benefits realisation management (BRM).

## WHAT SHOULD THE CALLING/PURPOSE OF ORGANISATIONAL PROJECT MANAGEMENT PRACTITIONERS BE?

According to *Definitions from Oxford Languages* obtained from a Google search, a **calling** is defined as “a strong urge towards a particular way of life or career; a vocation”. It could also be described as “a mission or purpose in life”. According to <https://www.huffpost.com> a **true calling** will emerge as you combine your top strengths and interests with what benefits others. When you **do that**, you are doing what you are **meant to do**.

In my early career in the late 1970s and early 1980s I was fortunate to be involved in the management of mega projects in South Africa (petrochemical and power stations construction). In the late 1980s I became an outage (shutdown) and project manager for a six-unit (593 MW each) coal-fired power station in South Africa. During that time, we made use of the early editions of Harold Kermer’s book *Project Management: A Systems Approach to Planning, Scheduling, and Controlling* as well as early versions of what today is known as the Project Management Institute’s (PMI’s) *PMBOK® Guide* to enhance and apply our knowledge of project management. I can still recall the day that I wrote the eight-hour PMP® exam in 1992. At that time, the *PMBOK® Guide* only consisted of eight Knowledge Areas (Project Integration Management and Project Stakeholder Management were only added later). As an outage and project manager at that time the key focus was to achieve the scope, time, cost, and quality objectives of outages (shutdowns) and projects as outlined in the Project Management Triangle (see Figure 1).

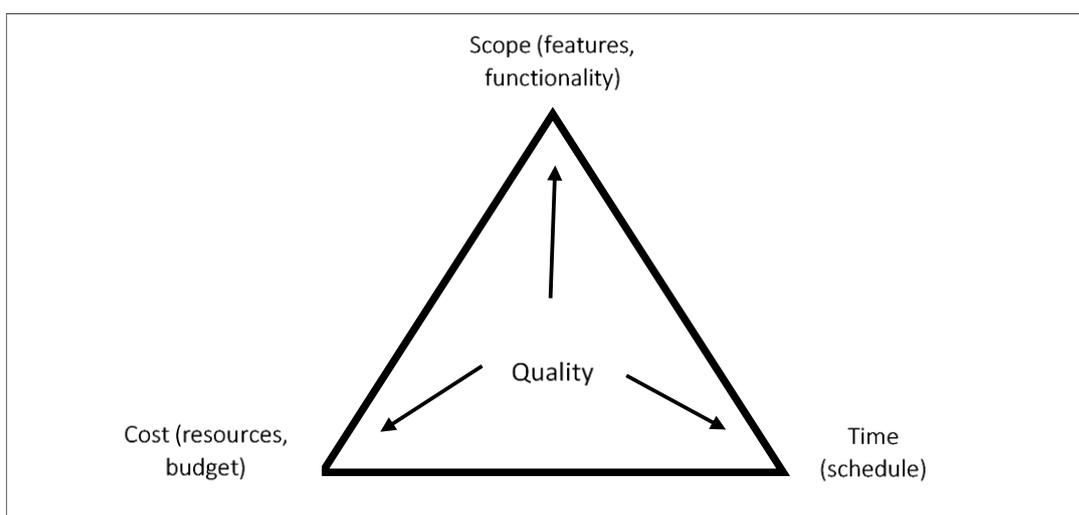


Figure 1: Project Management Triangle (Source: Wikipedia)

Figure 1 shows that the quality of the work of a project is constraint by the project's budget, deadlines, and scope (Wikipedia). The Project Management Triangle can be seen is an execution-focussed approach with the focus on delivery excellence that does not necessary guarantee the expected benefits promised in a project's business case. During that part of my career, we did not track benefits other than focussing on achieving the objectives of outages and projects as outlined in their scope statements.

It was only during the latter part of my career that I realised that organisational project management (i.e., portfolio, programme, and project management) is much more than achieving the objectives of programmes and projects within scope, budget, schedule, and quality. For me, organisational project management is about the creation of business value through the successful delivery of programmes and projects that are aligned to an organisation's strategic goals, objectives and strategies by ensuring that benefits actually accrue.

**Business value** can be described as “*the entire value of the business, the total sum of all tangible and intangible elements and is created through the effective management of on-going operations*”. A **benefit** can be described as “*an outcome of actions and behaviours that provide utility, value, or a positive change to the intended recipients*”. All operational, programme, and project endeavours of an organisation are intended to produce outcomes that add greater value to the organisation than the costs needed to produce them. Benefits Realisation Management (BRM) approaches offer a framework that organisations can follow to help yield more successful value-creating outcomes from their programme and project investments.

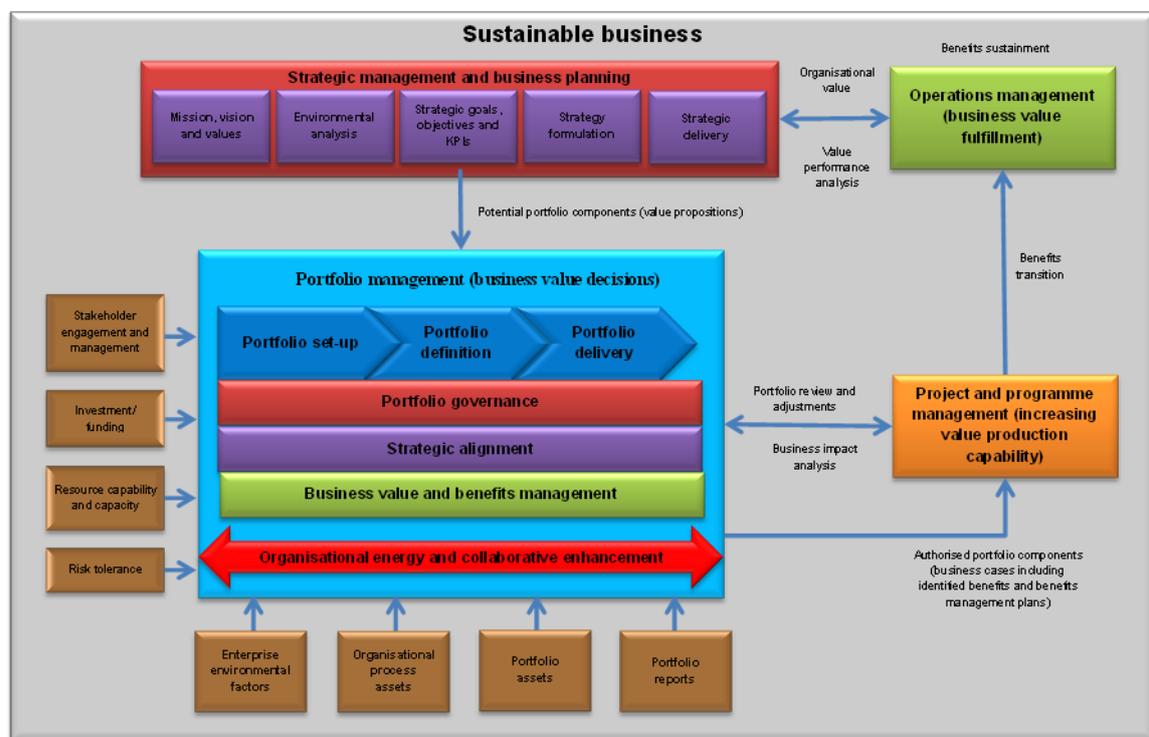
Far too few organisations have effective benefits realisation programmes in place to illustrate and measure how programmes and projects add true value to the organisation. Benefits realisation is challenging, but when executed well, it helps ensure that the outcomes of programmes and projects produce the desired benefits as projected in the business cases. In an article by myself (Smit, 2019) I shared an opinion that consideration should be given for the inclusion of additional Project Management Knowledge Areas during the development and review of the *PMBOK® Guide—Seventh Edition*, one being Project Benefits Realisation Management. The article referred to a report from the Association of Project Management (APM) Benefits Management Special Interest Group (SIG) (2012) that states that the uncertainty in financial markets and public sector spending cuts means that organisations can no longer continue to invest in change without a greater level of certainty that the benefits will be realised. Organisations that do not invest adequate effort in benefits management activities run the risk of not achieving adequate value from their investments in projects and programmes. PMI's Pulse of the Profession In-depth Report: *The Strategic Impact of Projects: Identify Benefits to Drive Business Results* (2016) confirms that if benefits are managed well, organisations realise the greatest possible return on their investments. Benefits ultimately justify the expenditure on projects and therefore organisations must focus on embedding benefits management across their entire organisation so that it becomes part of the everyday business activity. Benefits management is not optional; it is an absolute necessity for organisations to survive.

**I therefore believe that we as organisational project management practitioners are in the business of “value creation” and that this should be our key calling/purpose.**

As organisational project management practitioners we thus have a responsibility to ensure that our programmes and projects align with organisational goals, objectives and strategies that deliver value greater than their cost to achieve a predefined set of outcomes. We thus need to direct all our efforts in meeting the purpose of our programmes and projects to deliver the expected business value. We cannot waste money on programmes and projects due to a lack of a formal, focused approach to benefits management. We need to implement benefit realisation management (BRM) processes and techniques to ensure that our programmes and projects deliver benefits that align with organisational goals, objectives, and strategies. BRM requires a much more strategic approach to project planning and delivery. It requires organisational project management practitioners to understand the business cases to help shape the programmes and projects to better deliver on the on the organisational goals, objectives, and strategies.

## PORTFOLIO MANAGEMENT MODEL FOR EXECUTING ORGANISATIONAL STRATEGIES

Figure 2 outlines a high-level picture of a portfolio management model for executing organisational strategies that I (Smit, 2017) have developed as part of my PhD thesis which was published as part of a featured paper in the PMWJ in December 2017. This model can contribute towards the calling of organisational project management practitioners to create value for organisations and stakeholders.



**Figure 2: Portfolio management model (Source: Smit, 2017)**

The key elements of the portfolio management model in Figure 2 are briefly described in the sections that follow.

## **Sustainable business**

For a business to remain competitive and be successful it must be sustainable. To achieve sustainable development objectives, organisations must align strategic management and business planning with the three objectives of sustainable development which are economic efficiency, social equity, and environmental performance.

## **Strategic management and business planning**

**Mission** is the purpose and priorities of an organisation to compete in a competitive business environment. **Vision** is an organisation's highest aspirations and ideals for success and includes the goals, metrics and strategy that form the foundation for the organisation. A key criterion for vision is to achieve a competitive advantage with the focus on customers and competitors. **Core values**, behaviour of the organisation, and artefacts embodies an organisation's culture. Organisations perform **environmental analysis** (internal and external) to establish strategic goals and objectives. **Strategic goals** set direction to obtain a competitive advantage. **Strategic objectives** are specific results to be achieved within a given time-period and include targets and measures (KPIs). Strategic objectives must be written in a way that they are understandable and worded according to the SMART technique (specific, measurable, attainable, realistic, and time-bound) to facilitate the development of project objectives that align to organisational goals, objectives, and strategies. **Strategy formulation** establishes a roadmap to enable long-term organisational decisions and includes policies, directives, plans and actions for achieving strategic goals and objectives, either through operations (on-going organisational activities) or programmes and projects. **Organisational objectives and strategies** determine the potential portfolio components that should be addressed and prioritised to deliver value/benefits for the organisation. **Value propositions** must be used as the basis for selecting potential portfolio components and describe the work and benefits that must be delivered.

## **Portfolio management**

Portfolio management is the bridge between organisational strategy, programme and project management, and operations. Portfolio management is a systematic and continuous decision-making process by which an organisation evaluates, selects, and prioritises the work that is of the most value taking into consideration the allocation of scarce resources (financial, physical, human, technological) to best accomplish organisational goals, objectives and strategies consistent with the organisation's vision, mission, and values. Business cases are used as the basis for evaluating, selecting, prioritising, and approving portfolio components (programmes, projects, and other work) that will provide the maximum value/benefits for the organisation. Only projects and programmes that are aligned to strategic goals and objectives should be authorised for implementation.

## **Project and programme management**

Project and programme management are disciplines for managing the capacity to deliver business value. Programme management harmonises its project and programme components and controls interdependencies to realise specific benefits. Project management develops and implements plans

to achieve a specific scope that is driven by the objectives of a programme or portfolio. Projects must be treated in a strategic way to ensure strategic alignment with organisational strategies and sustainability. Project strategies must be developed to focus project teams on the strategic value of their projects and to get them to make decisions that support the strategic objectives. Projects must be selected based on their strategic impact and categorised accordingly (e.g., operational projects, strategic projects, external projects, and projects for internal customers).

### **Operations management**

It is in operations management where delivery of value is realised through day-to-day processes. After the completion of programmes and projects, benefits are transitioned to operational areas to ensure continued realisation of the benefits (i.e., sustainment of benefits). Transition is the ultimate measure of success, where the results of project-based work are moved into the mainstream of the organisation's operations.

### **CONCLUDING REMARKS**

I often find myself thinking and wondering if we as organisational project management practitioners are adequately making positive contributions towards a better society. I regularly read about the failures of mega projects here in South Africa and in other parts of the world (e.g., regular feedback from various PMWJ Senior Contributing Editors/Executive Editorial Advisors and International Correspondents). There are many organisational project management standards, practices, etc. from various project management professional bodies/societies/associations such as PMI, APM, IPMA, etc. that are continuously being improved but many programmes and projects still fail and do not achieve the desired outputs and outcomes to deliver the intended value/benefits.

Also, the unintended consequences of the current Covid-19 disease have resulted in the loss of economic capacity and consumer activity has contracted. Many organisations and businesses are confronted with new challenges regarding reduced income and profitability and liquidity. Many companies will not recover, and many people have already lost their jobs and income. Another unintended consequence can be a humanity disaster affecting the health and livelihood of people. This crisis provides an opportunity for organisational project management practitioners to respond to their calling/purpose by applying their knowledge, skills, and practices to assist countries and organisations to create a future economy by delivering sustainable business value for the benefit of society.

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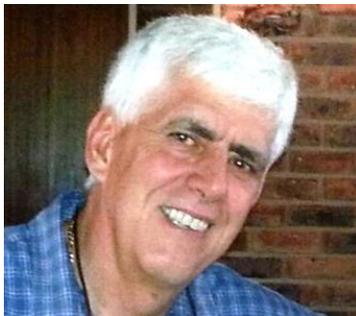
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## About the Author



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**Martin Smit** is semi-retired and the owner of a sole proprietorship, OrgPM-Value, that provides portfolio, programme and project management consulting, education and training services and products to help organizations to create sustainable business value. His career spanned some 45 years. He worked for Eskom, the electricity utility in South Africa, for 39 years where he held various management positions in construction-, outage-, maintenance-, and project- management. During the latter years Martin worked in the Eskom Project Management Office (EPMO) as an Organizational Project Management Specialist. He has extensive experience in the development and application of project, program and portfolio management methodologies, processes, and best practices. Martin is certified as a facilitator to conduct project definition readiness assessments. He is also certified to facilitate learning, conduct outcomes-based assessments and moderation. Martin has developed and presented various project- and outage- management training courses.

Martin holds a MSc (Management of Technology and Innovation) from the Da Vinci Institute in the domain of Project Management and a PhD in Engineering from the North-West University in the field of Development and Management Engineering. The title of his thesis was: “*Development of a project portfolio management model for execution organizational strategies: A normative case study.*” He also has qualifications in civil- and mechanical- engineering, information management, management, and maintenance practice. Martin has been a Project Management Professional (PMP®) since 1992 (No. 1071).

During his career Martin has presented various papers at national and international conferences and he has also published some articles in international journals.

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