

Re-affirming the importance of users in all project contexts ¹

By Alan Stretton

INTRODUCTION

Why do we develop projects? Project development and delivery typically result in the creation of new assets and capabilities. Yet, to what extent do we shape the delivery process to reflect the needs and aspirations of the ultimate users? (Dalcher 2015)

This lead quotation comes from an article by Dalcher 2015 entitled “*For whose benefit? Reclaiming the role of users in projects*”.

One could respond to Dalcher’s first question a little differently, by pointing out that projects can be seen as means to help users achieve their planned end outcomes, and to realise subsequent benefits. The ends are user responsibilities – projects are simply means, and normally only part of the total means, which help users achieve their ends.

Dalcher responds to his second question in the lead quotation as follows.

Answering the question is not easy: Perusing the bodies of knowledge reveals very little about users and their role in projects.

Dalcher made the above observation in 2015. Have things changed significantly since then? We will further explore this question shortly. In the meantime, we can observe that, in addition to bodies of knowledge, there are other sectors of the project management literature which are similarly deficient in information and/or guidance about the roles of users in project-related contexts.

On the other hand, Dalcher goes on to observe that there are some sectors in which users are quite specifically regarded as important components of project-related work.

In technology, engineering, information systems and computer science terms such as ease of use, usability, usefulness, and user satisfaction are typically associated with the developing attitude towards using a delivered system and the perceived success of the system or technology. Agile methods recognise the centrality of users to development, and make a concerted effort to include them in the development process, often tailoring the process around users.

However, the main point Dalcher makes in his article is that, “Users are an important, yet often forgotten part of projects”, as is typified by their comparative neglect in bodies of knowledge, for example This article will look at the nature of users, their comparative neglect in some sectors of the literature, their importance in all project management contexts, and suggestions about augmenting bodies of knowledge appropriately.

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We start by briefly looking at the nature of users, and their roles in project management processes.

USERS IN THE PROJECT CONTEXT

Who are the users of project deliverables?

Dalcher 2015 quotes the following straightforward descriptor from the 5th edition of the PMBOK Guide (PMI 2013).

“users are the persons or organizations who will use the project’s product, service or result”.

This is a straightforward descriptor, and as good a definition as any I have seen. The project’s *product, service, or result* have also been described as *assets* or *artefacts* (see next quotation below), as *deliverables*, and as *outputs*, which is the descriptor I will most frequently use in this article)

Users and stakeholders

Most bodies of knowledge of project management, including PMI 2021 (*The Standard for Project Management and A Guide to the Project Management Body of Knowledge*. 7th Edition), and many other relevant publications, do have quite a lot to say about project stakeholders. There are wide ranges of stakeholders whose needs and expectations need to be appropriately managed, and these are quite widely discussed.

However, comparatively few of these discussions really come to grips with the fact that the absolutely key stakeholders are the direct and/or ultimate users of the project outputs.

It is ultimate users who achieve outcomes and realise benefits

There is increasing discussion of outcomes and benefits in the PM literature. Yet, there is comparatively little discussion of the roles of the users who ultimately achieve them. As Dalcher 2015 points out,

Users are an important, yet often forgotten part of projects – as they are the key to utilisation of benefits.

What do the users do with project outputs? Along with other resources, they, or their representatives, use project outputs to help achieve their outcomes. In turn, these outcomes ultimately contribute to benefits for the organisation – which are often realised by other user groups.

THE COMPARATIVE NEGLECT OF USERS IN PM BODIES OF KNOWLEDGE, ETC.

Users appear to be still largely neglected in PM bodies of knowledge

We start this section with another quote from Dalcher 2015, which offers a little more detail on his concerns that the bodies of knowledge reveal very little about users and their roles in projects.

The project management bodies of knowledge offer scant information about dealing with users, understanding their needs, obtaining their feedback, establishing buy in, managing their expectations, or even communicating with users.

Dalcher made the above observation in 2015. Have things changed significantly since then? In responding to this question, we turn to the 7th Edition of *The Standard for Project Management and A Guide to the Project Management Body of Knowledge* (PMI 2021). It is first noted that, although the first subheading in its Preface is entitled “*Customer- and End-User-Centered Design*”, there is little in the main body of this document that is specifically concerned with the roles of customers and end-users in the project context. Indeed neither of these two entities is included in the seventeen-page list of definitions in its Glossary.

It is by no means clear why the PMI-based body of knowledge continues to largely neglect users. One possibility which has resonated somewhat with me was initiated in an article by Taggart 2015, which we will discuss in a moment. But first we need to distinguish between two types of organisations that undertake projects.

Identifying two types of organisations that undertake projects – OOs and SOs

Various writers in the project management literature have distinguished between two types of organizations that undertake projects. I have borrowed from Taggart 2015 in describing them as *Supplier* and *Owner* organisations, from Cooke-Davies 2002 with the broadly equivalent descriptors *Project-based* and *Production-based* organisations, from, and from Archibald et al 2012 (who use different descriptors) in defining them. These are summarised as follows.

- **Supplier Organisations – SOs (Taggart 2015), aka Project-based Organizations (Cooke-Davies 2002)**, derive most (if not all) of their revenue and/or other benefits from creating and delivering projects / programs to external customers.
- **Owner Organisations – OOs (Taggart 2015), aka Production-based Organizations (Cooke-Davies 2002)**, derive most (if not all) of their revenue and/or benefits from producing and selling products and services. They utilize projects to create new, or improve existing, products and services; enter new markets; or otherwise improve or change their organizations.

I will use Taggart’s more compact descriptors and abbreviations in the following.

Bodies of knowledge tend to focus on projects in Owner Organisations (OOs)

Taggart 2015 claims that the focus of project management bodies of knowledge is primarily on Owner Organizations (OOs).

Conventionally, either directly or by implication, the project management bodies of knowledge focus on the role of the Owner Organization (OO).....

Taggart's suggestion has resonated with me for a couple of reasons,

This OO focus is also a feature of the broader development of the PM literature

The first relates to my experiences with some of the early pioneering books on project management, well over forty years ago.

The first of these pioneering books was Cleland & King's *Systems Analysis and Project Management* (Cleland & King 1968). This book was obviously highly relevant to defence-acquisition projects, but a good deal of it had little relevance to much of my nearly twenty years' experience to that time, which had been mainly connected with Supply Organisations (SOs) in the building and construction domain. In particular, I noted that there was little discussion in their book on users or customers, whose needs were such important elements in the development of projects we (in Civil & Civic in particular) delivered to our users/customers.

The latter comment also applied to Kerzner's classic book *Project Management: A systems approach to planning, scheduling and controlling* (Kerzner 1979). Indeed, this comment appears to me to still be largely true of the more generalised project management publications at large – in addition to its bodies of knowledge, as already suggested by Dalcher and Taggart above. But, why has this happened?

The top concern has evidently been with project processes, rather than users

I can only surmise that the root cause of the above situation has been because, rather naturally, the emerging literature on project management was first, and foremost, concerned with internal processes in developing projects, and their management.

Might users have featured more prominently if the early project management literature had been mainly about SOs, rather than about OOs?

This is pure conjecture, but I have often speculated that, if the early focus of the project management literature had been instead on Supplier Organisations, with their abiding concerns with its users/customers, the needs of the latter might have featured much more prominently in the subsequent mainstream project management literature.

Conjecture or not, there is another consequence of the continuing focus in the project management literature on projects in OOs, one which is very relevant to the extent to which it can actually help project managers do their work better.

This consequence related to the situation that there appear to be more project people practicing in SOs than in OOs, as now briefly discussed.

Overall, there may be more project people practicing in SOs than in OOs

The following contention by Taggart 2015 makes this claim.

So, for each significant project there may be many PMs employed by SO, but there may be only one PM employed by an OO. It is my contention that this ratio is repeated across most projects and so most of the individuals engaged in the management of projects do so for Supplier Organizations (SO) rather than Owner Organizations (OO).

Taggart's contention has been broadly supported by some research work of Lehmann 2016. Lehmann surveyed some 246 project managers, and found that some 51% of respondents worked on what he called 'customer projects' – i.e. with SOs – whilst 44% were on 'internal projects' – i.e. with OOs – whilst the remaining 5% said that the setups of their projects didn't fit either.

If this is correct, it reinforces arguments for more emphasis on SOs

In light of the above, it would appear that project management in SOs does not get the coverage in the literature that its importance in terms of numbers of project managers involved in them appears to warrant. This simply reinforces other arguments that more emphasis on project management in SOs is needed.

Perhaps this could also stimulate the further development of materials relevant to users in the SO context. However, the importance of users is not confined to SOs, so we return now to the broader topic of users of project outputs in both SOs and OOs, and how to better provide for them in the project management literature.

RECOGNISING THE IMPORTANCE OF USERS IN ALL PROJECT CONTEXTS

For both OOs and SOs, if the users needs are not accurately identified, and reflected in the delivered projects, the latter will be deemed unsuccessful

This seems almost too obvious to need to be stated. Yet, it does not receive appropriate attention in at least some sectors of the project management literature. One example already mentioned is project management bodies of knowledge. Repeating an earlier quotation from Dalcher 2015,

The project management bodies of knowledge offer scant information about dealing with users, understanding their needs, obtaining their feedback, establishing buy in, managing their expectations, or even communicating with users.

Therefore, it seems reasonable to suggest that project management bodies of knowledge should include basic guidelines about user needs and outcomes

This may well be easier said than done. Whilst there is substantial in certain sectors of the literature about the earlier phases of understanding and elaborating users' needs, there is less substantive material on facilitating users' achievement of post-project outcomes, and subsequent realisation of benefits there-from.

We will briefly survey each of these two sectors in turn.

Body of knowledge guidelines for understanding and elaborating users' needs?

In the context of Supplier Organisations, I have written quite extensively about helping clients/customers clarify or verify their business (or equivalent) needs, before undertaking project definition – i.e. establishing the project requirements which will best help satisfy customers' business needs, notably in broad construction domains. In Civil & Civic we called the former Client Needs Determination (CND) (e.g. Stretton 2019c). In the mega-project domain I have often discussed roles of EPC (Engineering, Procurement, Construction) organisations in providing Front End Loading (FEL) services with similar purposes (e.g. Stretton 2020a).

In domains with which I am less familiar, I understand from colleagues that the importance of customers' needs has been seriously addressed in some service industries such as IT, finance and marketing. In particular, evidently Business Analysts have become prominent, particularly in IT, and this industry has recognised processes for needs and requirements gathering. The best known of relevant techniques appears to be Agile, which has its own substantial literature.

There are doubtless other domains which have also recorded approaches to understanding and elaborating user/customer needs – and also others in which such approaches have not been developed in an organised way.

However, none of the user-related approaches which have been developed to date appear to have found their way to any significant degree into bodies of knowledge of project management. In view of the fact that there are already so many materials available in the wider project management literature, it would not appear to be unreasonable to suggest that they be collected, collated and summarised in bodies of knowledge. Such user-related additions would be of immense benefit to all.

Guidelines for facilitating users' achievement of post-project outcomes?

There is increasing discussion on “project” outcomes, but little on users' roles

Outcomes and benefits from projects are being increasingly discussed in the project management literature. However, as noted above, there is not much substantive material in the project management literature on facilitating users' achievement of post-project outcomes, and subsequent realisation of benefits there-from.

For example, *The Standard for Project Management and A Guide to the Project Management Body of Knowledge* (PMI 2021) includes, in its own words (Preface, p. x),

.....a stronger focus on outcomes rather than deliverables.

However, there is little mention in PMI 2021 of the roles of users in achieving them. As already noted, although the first subheading in its Preface is entitled “Customer- and End-User-Centered Design”, the main body of PMI 2021 has little specific material on the roles of customers and end-users in the project context. Nor is either of these two entities included in its very substantial list of definitions in the Glossary.

Use of verbs such as “enable” to link PM with outputs can be misleading

PMI 2021 quite frequently uses the verb “enable” to link project management with the achievement of outcomes. For example, its Standards (S) section (PMI 2021:S3) says,

The Standard for Project Management provides a basis for understanding project management and how it enables extended outcomes.

The rather natural question that arises from this quotation is, “Project outputs/project management enable **whom** to achieve the outcomes?” This question is not really answered in PMI 2021. However, as has been so strongly indicated in this article, to my mind the short answer must surely be **the users**.

It is also noted here that other writers have used other generalised verbs in much the same way as PMI’s “enable”. For example, Morris 2913:285, uses the verb “seek” in a similar vein in observing that “Projects seek outcomes as well as outputs”. OGC 2007:4 used “Deal with” in its highly disputed assertion that “Programmes deal with outcomes; projects deal with outputs”.

It is far from helpful that generalised verbs such as “enable” can be, and have been, interpreted in different ways. For example, Smith 2022 has evidently interpreted PMI 2021 as meaning that project management is responsible for achieving outcomes – as illustrated in the following quotation (Smith’s emphases):

....PMI’s new holistic approach broadens the Project Management Team’s scope of responsibilities to encompass *effective delivery of Outcomes*.

On the other hand, I have not interpreted PMI this way, but have asked the above question as to who is the “enabler” – who appears to me to be the user.

Another interpretation of “enable” is that project management can help users achieve post-delivery outcomes. This is certainly the case with many types of projects and users. However there are also many other instances where project management cannot help users achieve objectives. Therefore this interpretation of “enable” does not always reflect the reality of practice.

More definitive guidelines on facilitating users’ achieving outcomes would enhance the utility of bodies of knowledge

In light of the above discussions, there appears to be a strong case for PMI 2021 to be much more definitive in discussing specific ways in which project outputs are converted to outcomes, the roles of users in these processes, and how project management can, or cannot, facilitate the achievement of users’ outcomes in particular circumstances.

This is a big “ask” in the absence of substantial existing materials on these processes, but it is an important one. I have made some exploratory efforts to include the roles of users in converting project outputs to outcomes, and ultimate benefits, in some recent articles in this journal, including Stretton 2021k, l, n and Stretton 2022c, d. Most of the models in these articles have been extensions of the following basic figure, depicting users converting three key types of project outputs into operational outcomes/ benefits.

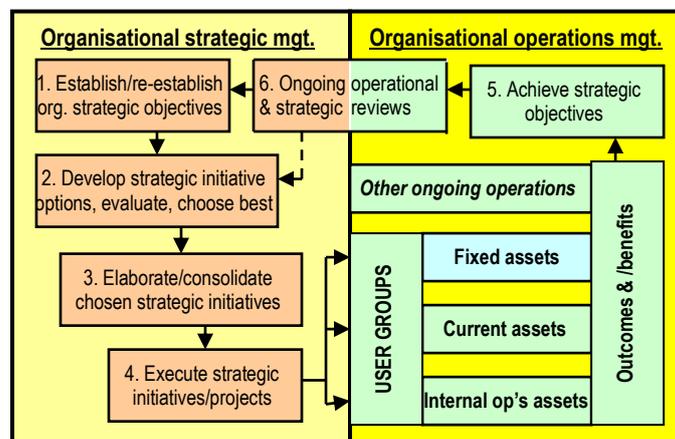


Figure 1. Compacted representation of organisational user groups converting project outputs into key types of assets, and thence into organisational benefits (from Stretton 2021n)

However, I have not yet found a way of developing these models into more specific detail without them also becoming over-complicated – although I will continue to try. I can only hope that some of these exploratory efforts might suggest avenues for future bodies of knowledge writers to develop guidelines for facilitating users’ achievement of post-project outcomes, and the ensuing realisation of benefits.

SUMMARY/DISCUSSION

This article has been concerned with re-affirming the importance of users in all project contexts, and has recommended that this be more widely acknowledged by appropriate inclusions about the roles of users in bodies of knowledge of project management.

We started by defining the users of project deliverables, by distinguishing the key role of users from those of other stakeholders, and by pointing out that it is the ultimate users who achieve outcomes and realise benefits

We then discussed the comparative neglect of users in project management bodies of knowledge and allied documents. After identifying two types of organisations that undertake projects – Owner Organisations (OOs) and Supplier Organisations (SOs) – it was noted that bodies of knowledge tend to focus on projects in Owner Organisations (OOs), and that this was also a feature of the broader development of the PM literature. It was suggested that this has been because the top priority has rather naturally been with elucidating project processes, rather than with users. I also conjectured that users might have featured more prominently if the early project management literature had been mainly about SOs, rather than about OOs. In any event, we appear to have a situation where there may be more project people practicing in SOs than in OOs. If correct, this could reinforce arguments for more emphasis on projects in SOs

Returning to the important roles of users, it was pointed out that, for both OOs and SOs, if the users needs are not accurately identified, and reflected in the delivered projects, the latter will be deemed failures, to some extent or other. Therefore, it seemed reasonable to suggest that project management bodies of knowledge should include basic guidelines about user needs and outcomes.

We then suggested that body-of-knowledge guidelines for understanding and elaborating users' needs could be reasonably readily developed, by collecting, collating and consolidating the rather substantial materials already existing in various domains of the broader project management literature.

However, developing body-of-knowledge guidelines for facilitating users' achievement of post-project outcomes, is a more difficult proposition. It was first pointed out that current use of verbs such as "enable" to link project management with outputs can be interpreted in different ways, and are potentially, and actually, misleading. It was therefore suggested that bodies of knowledge need to be much more definitive in discussing specific ways in which project outputs are converted to outcomes, the roles of users in these processes, and how project management can, or cannot, facilitate the achievement of users' outcomes in particular circumstances. Developing such guidelines would be quite a demanding task mainly because there is not much substantive detailed material in the broader literature which really comes to grips with the key roles of users in achieving outcomes and realising benefits. A few writers, including myself, have ventured into this domain, but much more work needs to be done to develop the kind of definitive guidelines on facilitating users' achieving outcomes which would enhance the utility of bodies of knowledge to really cover this post-delivery domain in a much more inclusive way.

Such user-focused post-delivery guidelines, together with guidelines for understanding and elaborating users' needs in the first place, represent a challenge for developers of project management bodies of knowledge. But it is suggested that such guidelines would enormously enhance the value and utility of such bodies of knowledge, and that this challenge should therefore be accepted, and implemented.

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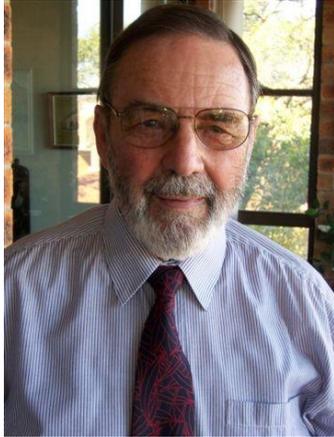
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