

My ten learnings in the process of preparing, approving and deploying International Standards in project management ¹

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Summary

The author shares ten valuable lessons learned connected to his experiences in the preparation, approval, and deployment to end-users of procedures, Norms, and international Standards in project management.

Introduction

According to the Dictionary, a Norm is defined as an accepted Standard or a way of being or doing things and a Standard is defined as an official rule, unit of measurement, or way of operating that is used in a particular area of manufacturing or services.

International procedures, Norms and Standards are references for the dissemination of shared knowledge and the application of best practices in a field of action⁽¹⁾; they provide a framework to which to adhere, a common language and show an accurate, proven way of working. If we follow a Standard, we can be reasonably sure that what we do will be well done and that it will be equally understood in whatever scenario of application.

Examples may include building Standards, environmental Standards, health and safety Standards, food quality Standards, calibration of tools, Standards for accounting systems and financial statements, to mention just a few. But there are many more and, in fact, we can observe that our life is surrounded by Standards that make our day-to-day life easier.

The most robust Standards are clear, precise, easy to understand and serve as an illustrative model for their purpose; but unfortunately, some Standards are unclear, ambiguous, inadequately structured and might lead to misunderstandings in their interpretation.

Valuable learnings about the process

Based on my own experience in the preparation and review of Standards, I have extracted the following ten valuable lessons learned, which are detailed below:

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1) In-depth knowledge of the topic covered

The Standard may be relevant to many people or sectors, so it is important to involve preparers and reviewers who are experts and have first-hand knowledge of the topic, in order to develop a Standard that really covers the whole spectrum of knowledge needed and it is useful to be applied on a day-to-day basis.

2) Abstraction skills

This is useful to turn ideas and recurrent practices into wisdom, to transform day-to-day activities into something written that can help others to perform better. It is not only knowing what needs to be done on a daily basis, but also knowing how to transform that knowledge and good practices into a written document that is self-explanatory and understandable by others.

3) Analysis of other published Standards

Lean on shared knowledge, templates and best practices available to ensure that the new Standard adds value to what is already published.

4) Enjoy working with people

Standards are made by people to serve other people; an important thing about Standards that are truly representative is that they integrate the knowledge of many experts, probably scattered in different places. It will be necessary to talk many times in person or remotely, exchange experiences, ideas, and points of view on the subject involved to find the best and most useful content to be written.

Preparers and delegates will probably not agree on everything, so it will be necessary to talk and negotiate on an ongoing basis to reduce differences and find common ground to continuously move forward.

5) Empathy, assertiveness, and ability to reach win-win agreements.

Since the process of creating a Standard involves experts that might have different points of view, it will be certainly necessary to agree on the final content and reach an outcome that is representative and integrates the agreements of the different stakeholders and workstreams.

This will require empathy, assertiveness, understanding of other experts' vision and forging together an agreement that is better than the sum of the individual parts; this integrating outcome is fundamental for a Standard to be accepted and widely applied by the target audience.

6) Language and vocabulary

International procedures, Norms and Standards are published in a written document; therefore, it is very important to have a well-developed ability to express abstract ideas and concepts in writing in a clear, objective, and precise manner, using a broad vocabulary adapted to the context of the target users.

The preparers, reviewers and approvers of the Standard are aware of the context in which it is written, why a word or phrase is written instead of another; but it is very likely that the end-user does not have that information and context when reading the final document published.

If the Standard is intended to be widely applied, it is necessary that the text is so well and accurately written that any person within the target audience should be able to read the document, understand it and get the appropriate knowledge to apply it effectively.

7) Manage stakeholders' expectations

Teams developing a Standard do not generally do it in isolation; they usually interact with different stakeholders that ensure that the outcome is successful and representative of the best practices in the field.

Managing stakeholders' expectations during preparation is a very good practice in this regard, telling them how the draft is evolving, cross-checking steps to be taken, requesting their opinion and keeping them up to date on the progress to ensure that the concepts and practices included in the written document are representative and will be approved at the final stage.

All official documents must be approved in one way or another, so it is key to know that a team's efforts are going in the right direction.

8) Attention to detail and rigor in reviewing process

The preparation of a Standard requires multiple revisions, whether technical, grammatical, or formatting; and the wider the target audience and the number of potential users, the greater the number of revisions and people involved in such revisions.

This requires great meticulousness, attention to detail and rigor in each comment during the review process; it is fair to say that this might be tedious, sometimes frustrating and will likely require a lot of patience, but it is a fundamental part of ensuring that the final document is complete, has the right quality, and it is suitable for its application.

It is important to ensure that there are no spelling or formatting mistakes (which would show a bad image), as well as to pay attention to the words, vocabulary, and presentation so that the reader can easily understand its benefits and what steps to follow to apply the Standard.

9) Communication

It must be properly announced and be well known by the stakeholders affected that a new Standard is being prepared; this is a relevant aspect for two main reasons:

- a) It will enable the best professionals in the field to consider being part of the team in charge of preparing or reviewing the Standard; this will ensure that the most advanced knowledge and the most representative opinions are included in the document.
- b) It will increase the chances that the Standard will be widely applied by the target audience.

10) Deployment to end-users ⁽²⁾

Standards are not conceived simply to be written down on paper and be kept in a library; their usefulness lays on their widespread application by end-users.

The steps of writing, approving, and applying the Standard are not immediate and do not happen overnight; it is usually necessary to spend a lot of time and effort in change management so that users correctly adapt to the new Standard, eliminate obsolete practices, and reinforce those that are in line with the new guidelines published.

Conclusion

The application of these ten valuable lessons learned and best practices can be very useful to facilitate the preparation, approval and deployment of procedures, Norms and international Standards in project management.

Without a doubt, one of the key elements is that they are made by people to serve other people, so empathy, assertiveness, rigor, and attention to details are essential to publish representative Standards that wisely integrate the available knowledge and views of experts in the field and, as a consequence, are widely applied by end-users.

References

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About the Author



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Human leadership, Global Sustainable Projects, Renewable energy, Story-teller, Keynote speaker, Lifetime learner, Risk management, Standardization

Manuel Ancizu is passionate about human leadership, sustainable projects and people's motivations. Enjoys working in international multicultural environments and wants to have a positive impact in society.

Manuel graduated in Economics from University of Navarra and obtained an MBA from IESE Business School (Spain); he has also studied in CEIBS (China) and University Anahuac del Sur (Mexico). He holds a number of professional certificates such as the PMP by Project Management Institute, Lead Auditor in ISO 9001:2015 by IRCA Association and has also received training in Management of Development Projects and Risk Management by Interamerican Development Bank (IDB).

Manuel has lived in Spain, France, UK and Mexico; he currently works in the wind energy sector leading the quality management of Offshore projects. Manuel has been involved in wind energy renewable projects developed in different parts of the globe with external customers, as well as in internal projects of cultural transformation, IT and global processes.

Thanks to his experience, he has delivered training sessions, lectures and keynotes to a different number of institutions.

Manuel is a qualified member of the Spanish Standardization Body (UNE) and has been involved in the development of Standards and Norms in Projects, Programs and Portfolios; he has also participated in the translation of different ISO 21500 to Spanish language.

Manuel loves smiling, storytelling, dreaming and making ideas come true in a sustainable manner.

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