

## *The Road to Responsible Collaboration*<sup>1</sup>

### **Part 3 Organize to Collaborate**<sup>2</sup>

**Robin Hornby**

#### Summary

*In this series, Robin Hornby argues that the effectiveness of project management is improved by driving project responsibility into the organization and creating conditions favorable to 'responsible collaboration'. But this collaborative environment will not fall into place without the support of senior management and the adoption of enabling frameworks, guidelines, and techniques. In this third article, Robin argues that specific drivers, some well-known but re-imagined as evolutionary steps, lead naturally to project management maturity and the complete alignment of corporate and project goals.*

#### Introduction

In the previous article I discussed techniques the project manager (the PM) can use to foster alignment. Although these are beneficial, I concluded that to reach alignment state 3 some minor changes to the organization are also needed. The owner must commit general management and senior staff to these changes and the PM must adapt to the shift this implies.

PMs are beset by a constant stream of changes and refinements to the discipline of project management (PM). They must wonder whether such changes are merely resolving narrow problems or are taking steps towards PM maturity. As in biological evolution, developments following a path *proven to be successful* deserve most attention. Analyzing changes using such an evolutionary analogy may provide a perspective on expected value and possibly identify a mature destination.

Using this analogy, some evolutionary branches can be imagined, starting with the technical formalization of PM in the mid-1950s. Scores of techniques have now evolved. Knowledge was first formalized around the triple constraint (cost, schedule, and scope), but progressively expanded to include both specialized material such as risk, aspects of quality and purchasing, and more general management topics such as human resources and interpersonal skills.

A second evolutionary branch concerned the scope of the work itself. In the beginning, the entity to be managed was simply a project. Then it grew to multiple projects, then to a program of

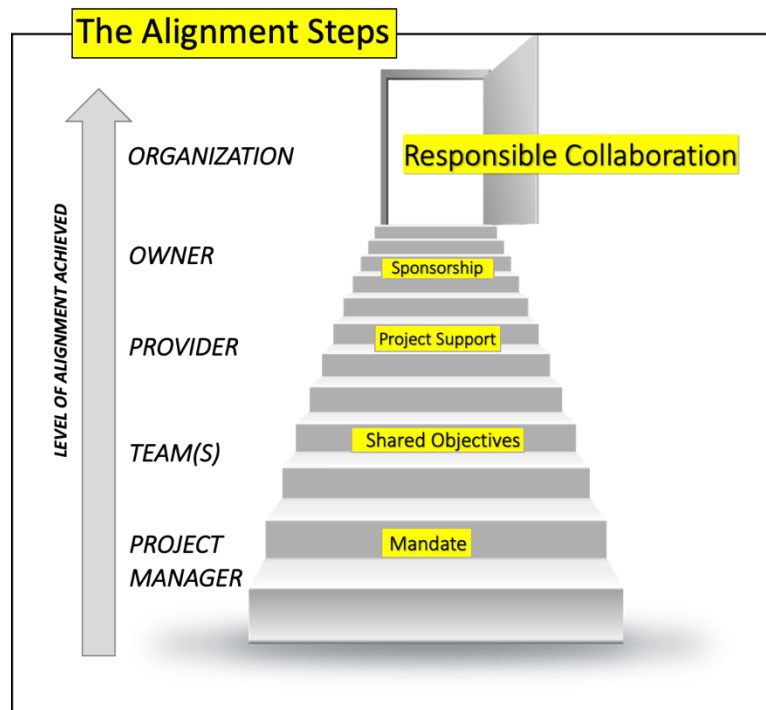
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<sup>1</sup> Editor's note: This series of articles is by Robin Hornby, author of four books including *A Concise Guide to Project Collaboration: Building a Delivery Organization* (Routledge 2023) and *Commercial Project Management: A Guide for Selling and Delivering Professional Services* (Routledge 2017). Learn more about the author in his profile at the end of this article.

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related projects, and then to a project portfolio chosen for attributes of presumed interest to executives.

But the most compelling evolutionary branch has a natural affinity with the true goal of PM, which is fundamentally a method for getting work done. As I argued in part 1, it is self-evident that the people who have both a role on the project *and* a functional position in the organization must be engaged and committed to its success. Historical initiatives to strengthen PM by following this idea are steps towards owner/provider alignment and open the door to an evolutionary destination. The graphic, The Alignment Steps, provides a visual for this proposition.



## The Alignment Steps

The assertion is that PM must evolve through each of these steps, broadening the level of alignment to reach a state of maturity:

- 1) The Project Manager Establishes a Mandate with the Owner: Moving beyond expertise in the planning and control tools epitomized by PERT and Gantt charts, it was gradually realized that getting work done requires formal authority. Today, a project charter or a contract delineates the PM's *mandate* to accomplish defined objectives. This underwrites the alignment of the PM.
- 2) The Team Adopts Shared Objectives: The project team, under the direction of the PM, is an early focus for alignment with project objectives. Techniques described in part 2, and other leadership actions, should ensure the team *shares objectives* and is solidly behind the project.
- 3) The Provider Offers Uniform Project Support: PMs have naturally looked within their service provider organization for *project support*. The project management office (PMO) originated to align all projects with standard operational procedures. Within that framework, PMOs vary

in degree of authority, from passive to active. A more active PMO would take responsibility for managerial activities such as reviews, audits, approval of specified project deliverables, and performance assessments. Every PMO should ensure the provider is aligned with project objectives. A more recent development integrates a support role and a point of accountability within the provider for both project deliverability and its delivery. Titled as a Delivery Manager, the role ideally carries executive authority, and has been successfully implemented by vendors following designs such as those described in *Commercial Project Management*<sup>1</sup>. In-house provider implementations are expected to increase as delivery failures become intolerable.

- 4) The Owner Appoints a Project Sponsor: The notion of project sponsorship was the first concrete attempt to identify management responsibility for projects outside of the provider. The generally accepted function of *sponsorship* is to establish a point of ownership for the project, provide the financing, and to take responsibility for key project decisions. This is a major advance because success is uncertain without the participation of the owner. A further step remains; to detail sponsor responsibilities in the same way as the project manager, so that owner/provider management is harmonized, and project execution is more predictable.
- 5) The Organization Recognises Responsible Collaboration: Here are the steps to open the door to collaborative engagement:
  - Stakeholders Acquire Responsibilities: Identifying the stakeholder role was a useful advance but it must be revisited. A stakeholder is not merely invested in the outcome of a project, but is also in possession of rights, interests, and responsibilities. A responsible and Collaborative StakeHolder is born. Forgive the jargon: a CSH in short!
  - The Sponsor Confirms CSHs: A CSH can be anyone in the organization. During project initiation the sponsor will confer with the PM, solicit likely stakeholders, consult adjacent managers, and corroborate the chosen or self-selected individuals. The project charter is a likely document to record the CSHs to be engaged with the project.
  - CSHs Are Trained: Training is essential because they are expected to engage. It is not onerous, more akin to familiarisation. Those to be trained include owner managers and their most senior staff. When a project starts that needs their profile and their engagement is agreed, they know exactly what to expect.
  - Project Management is Revised: The PMO must broaden and adapt their operating procedures to incorporate the role of the CSH. This mainly impacts administrative-type procedures and a handful of professional practices in which CSHs engage.
  - The PM Role is Modified: The PM still carries primary accountability but should regard each CSH as a partner rather than a customer to be satisfied. The CSH will understand the sponsor's priorities and will present requirements but will also accept responsibility to assist with analysis, to resolve conflicts, or mitigate cost impacts, rather than leaving it all to the PM. The PM must expect to facilitate CSH sessions instead of working alone and doggedly seeking inputs and decisions.

- Analogies Make the Shift Approachable: Laying this out analytically makes the shift look more forbidding than it is. An analogy to quality, ethics, or HR policies may make for easier acceptance. Those corporate initiatives primarily require new behaviours, perhaps some new techniques. In time, it's second nature.

These steps ultimately lead to a cultural shift where projects are regarded as a natural event in corporate life and owner personnel with interests understand their role should they be engaged.

## Conclusion

Imagine what it would be like to begin a project where the PMO procedures include the expected and predetermined contribution of the owner. Where the sponsor is fully cognisant of the role and eager to discuss the best CSHs for the project. Where all the ingredients of alignment state 3 are present and, if the recipe is followed, the proceedings can unfold without arguments about who can help, or about procedures, responsibilities, or authority. In this world, the PM can stop worrying about an owner who is missing in action, passively hostile, or at best, politely disinterested. The burden is shared.

I was impelled to write my recent book, *A Concise Guide to Project Collaboration*<sup>2</sup>, to provide a practical template for such an initiative, which I call the Delivery Organization. It is aimed at corporate managers, not just the PMs, and is designed for both in-house and vendor providers. Managers need to understand the concept and its benefits so they can give their authority for implementation to the PMs, who can use the template described in the book.

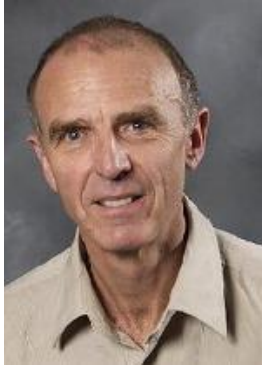
## Future Articles

Forthcoming articles will discuss the important topic of business alignment and the commonly encountered barriers to collaborative engagement. We will continue with a review of frameworks to support this new environment and conclude with practical recommendations on how to build the Delivery Organization.

## References

- 1 Hornby, Robin. 2017. *Commercial Project Management: A Guide to Selling and Delivering Professional Services*, Routledge. <https://www.routledge.com/Commercial-Project-Management-A-Guide-for-Selling-and-Delivering-Professional/Hornby/p/book/9781138237681>
- 2 Hornby, Robin. 2023. *A Concise Guide to Project Collaboration: Building a Delivery Organization*, Routledge (Focus Series). <https://www.routledge.com/A-Concise-Guide-to-Project-Collaboration-Building-a-Delivery-Organization/Hornby/p/book/9781032435459>

## About the Author



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**Robin Hornby** worked in Information Technology for over 40 years, taught project management at Mount Royal University for 12 years and maintained a consulting practice. He worked across Canada and internationally, was a long-time holder of the PMP designation, and presented frequently at PMI symposia. He pioneered many delivery management practices and is the author of four books. His latest book titled [A Concise Guide to Project Collaboration: Building a Delivery Organization](#) was published in 2023 by Routledge. For more information, visit [www.tmipm.com](http://www.tmipm.com). Robin Hornby can be contacted at [rhornby@shaw.ca](mailto:rhornby@shaw.ca)