PM World Journal (ISSN: 2330-4480)
Vol. XII, Issue IX – September 2023
www.pmworldjournal.com
Commentary

2. Some contradictory entries in PMI 2021 re post-delivery outcomes, and comments on user roles, and project management involvement
by Alan Stretton

A two-part commentary on "outcomes" in PMI 2021, 7th Ed.

2. Some contradictory entries in PMI 2021 re post-delivery outcomes, and comments on user roles, and project management involvement [1]

By Alan Stretton

INTRODUCTION

Stated aspirations of a stronger focus on outcomes in PMI 2021

This article is the second of a two-part commentary which is primarily concerned with a stated aspiration of PMI 2021 – *The Standard for Project Management and A Guide to the Project Management Body of Knowledge,* 7th *Edition* – to increase its focus on outcomes from project activities, rather than just on deliverables.

In its Introduction, the first article included the following relevant quotes from the Preface to PMI 2021, page x).

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

> …..to focus more on intended outcomes rather than deliverables

The outcomes referred to in these two entries are clearly what I have described as post-delivery outcomes. I have used this terminology to distinguish these types of outcomes from other usages/meanings which are also used in PMI 2021. I described these different usages as inconsistencies, and these were the main topics discussed in the first article of this two-part series, whose principal findings are now summarised.

Summary of Part 1: Some inconsistencies of usages of "outcomes" in PMI 2021

The first article (Stretton 2023j) found some sixty-six outcomes-related entries in the Standard and PMBOK Guide sectors of PMI 2021. Different meanings and usages of "outcomes" were (somewhat tentatively) categorised, as shown in Figure 1 below, which also shows the frequencies of their appearances in these two main sectors.

It is noted here that details of the sixty-six outcomes-related entries, which were presented in Figures 2 and 4 in the first article, are reproduced as Appendices A and B to this article – both to facilitate referencing, and as substantial informational resources in their own right.

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[1] How to cite this work: Stretton, A. (2023). 2. Some contradictory entries in PMI 2021 re post-delivery outcomes, and comments on user roles, and project management involvement, Part 2 of a commentary on "outcomes" in PMI 2021, *PM World Journal*, Vol. XII, Issue IX, September.

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		The Standard	PMBOK Guide	TOTALS	
↯	**Pre-delivery results**	0	26	26	These types of entries are concerned with intermediate project operational goals prior to project delivery.
❖	**Deliverables/ outputs**	7	5	12	These types of entries specifically nominate project deliverables/ outputs as the "outcomes"
✓	**Post-delivery outcomes**	9	2	11	Post-delivery outcomes are either directly identified, or inferred because they are coupled with, and follow, deliverables/outputs
#	**Which type of outcome?**	7	4	11	These types of entries do not state whether they refer to deliverables/outputs, or post-delivery outcomes, or ???
➤	**Post-outcome results**	6	0	6	These types of entries specifically focus on benefits and/or value, and some include the roles of customers and/or end users
	TOTALS	29	37	66	

Figure 1. Types and frequencies of outcomes in the Standard and PMBOK Guide in PMI 2021

The following suggestions were offered for dealing with some of the inconsistencies of usage and/or meanings of "outcomes" in PMI 2021

- Categorise the different types of meanings/usages of "outcomes" (perhaps broadly along the lines suggested in Figure 1 above).
- Ensure that the type of outcome being discussed is always identified

- Amend some of the wording in the "Checking Results" table for each Project Performance Domain in the PMBOK Guide
- Amend corresponding wording in the initial figure for each Performance Domain

In terms of numbers of entries in both the Standard and the PMBOK Guide, it was noted that the frequency of citing of post-delivery outcomes was quite low in the former, and very low in the latter – a situation which does not align very well with the stated aspiration of PMI 2021 to focus more on post-delivery outcomes than on deliverables.

This suggested a need to amend such aspirational-related entries accordingly. But it was noted that this second article will have a good deal more to say about post-delivery outcomes, so that a postponement of any such amendments was deemed advisable.

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Previewing Part 2 of this two-part series

In this second part of the commentary, we move from inconsistencies in the meanings and usages of outcomes in PMI 2021 to rather more substantial issues, particularly regarding post-delivery outcomes, and responsibilities for their achievement.

I have approached these issues by first discussing two groups of entries which offer contradicting conclusions regarding who actually has these responsibilities.

The first group of entries specifically includes definitions of customers and end users, and identifies the latter as the direct "users" of the project deliverables. This is also seen to imply that the end user is responsible for achieving the post-delivery end outcomes.

A second group of entries includes one that asserts that "the project team delivers the outcomes, benefits, and value" – which implies that the project team is responsible for achieving these objectives. This directly contradicts the conclusions of the first group.

Substantial further discussions of each group of entries, including materials from the broader project management literature, will support the conclusion that it is users of project outputs who achieve post-delivery outcomes – not project teams or project managers.

In view of this finding, we will then discuss possibilities for increasing the focus in PMI 2021 on the roles of users in achieving outcomes, by building on its existing user-related entries. We will start with a variety of other entries to which the role of users can be very readily added – which increases the user focus, and also tends to enhance the utility of these entries. We will also demonstrate how a projects-deliver-outcomes entry can be quite readily changed to a user-of-project-deliverables one. Overall, these examples appear to indicate that relevant sections of PMI 2021 could be re-cast to increase the focus on the roles of users, without unduly disrupting the flow of other components of this document.

This then leaves the role of project management in relation to post-delivery outcomes to be clarified – i.e., in view of the above discussions, what roles project management may play in helping users achieve outcomes. We will first identify very many contexts in which project management is not able to help users achieve outcomes – a situation which should be properly acknowledged in PMI 2021. We will then discuss some of the many types of situations where project management can, and does, help users achieve outcomes. These are somewhat basic, certainly incomplete, and appear to represent an opportunity for PMI 2021 to expand and consolidate such materialism and to add appropriate guidelines for project managers to help users achieve outcomes (when they are in a position to do so).

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ENTRIES INCLUDING CUSTOMERS & END USERS OF PROJECT DELIVERABLES *AND INDICATING THEIR RESPONSIBILIES FOR ACHIEVING END OUTCOMES*

Entry re progression from deliverables, through outcomes, to benefits and value

We start with an entry from early in the Standard which illustrates a typical progression from deliverable through outcomes to benefits and value.

S4	➢ The components of a value delivery system create deliverables, which are used to produce outcomes. An outcome is the end result or consequence of a process or a project. The outcomes create benefits, which are the gains realized by the organization. Benefits, in turn, create value, which is something of worth, importance, or usefulness. (PMI 2021:S10)

In addition to laying out this typical progression, this entry also specifically says that deliverables are used to produce outcomes – but does not indicate who the users are.

Entry identifying customers, and end users who directly use project deliverables

Entry S8 introduces and defines customers and end users, and identifies the latter as the direct "user" of the deliverables.

S8	➢ The customer and end user are not always synonymous. For the purpose of this standard, the customer is defined as the individual or group who has requested or is funding the project. The end user is the individual or group who will experience the direct use of the project deliverable. (PMI 2021:S13)

Identifying the end user as the direct user of the project deliverables is also seen to imply that the end user is responsible for achieving the end outcomes.

Entries linking customers and end users with initiation and success of outcomes

There are also two entries which directly link the customers and end users with the initial establishment of outcomes, and their perspectives on the success of outcomes.

S9	➢ Projects need clear directions from customers and end users regarding project requirements, outcomes, and expectations (PMI 2021:S14)

S15	➢ Value, including outcomes from the perspective of the customer or end user, is the ultimate success indicator and driver of projects. Value focuses on the outcomes of the deliverables. (PMI 2921:S34)

Entry S9 indicates the need for customers and end users to make direct inputs into establishing the required outcomes in project initiation stages, whilst entry S15 points to the fact that it is their perspective which is the indicator of successful outcomes, and ensuing value.

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It is evidently unrealistic to talk about outcomes without also talking about users

The above group of entries very clearly indicate that it is the users who ultimately convert the project outputs/deliverables into outcomes. Indeed, it is difficult to see how the achievement of broader outcomes can be realistically discussed without including the role of the users of project deliverables.

As Dalcher 2015 put it,

> … it is use that provides benefits, and not the project …
> Users are an important, yet often forgotten part of projects – as they are the key to the utilisation of benefits.

Yet the role of users is under-represented here, and in the broader PM literature

In addition to the above four entries, there are a couple of others which also allude to customers and users. However, these six user-related entries represent only 20% of the 29 outcomes-related entries in the Standard, and less than 10% of the total 66 such entries in both the Standard and the PMBOK Guide.

Dalcher 2015 commented on the under-representation of users in project management bodies of knowledge quite a few years ago, as follows.

> 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.

It would appear that this situation has not changed all that much, at least as PMI 2021 is concerned. However, this kind of under-representation of users is not confined to PMI, but is also a feature of the project management literature at large. I have discussed some exceptions to this under-representation in several articles in this journal, in which I have addressed various aspects of the role of users of project outputs, and their responsibilities for achieving outcomes (Stretton 2021k,l,n and Stretton 2022j).

There is only one outstanding exception to this under-representation of users, and this is with Agile methods, which recognise the centrality of users to project development – as will be further discussed later. However, Agile methods are not appropriate in many project contexts – whereas the key role of users is common to all project contexts

Most of the outcomes-related entries in PMI 2021 focus on PM, rather than users

The under-representation of users in PMI 2021 has already been discussed in general terms. But we will now look more closely at various entries which imply, or in one case state, that project management is responsible for the achievement of outcomes – and which do not mention users at all.

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ENTRIES INDICATING THAT PM IS RESPONSIBLE FOR ACHIEVING OUTCOMES

Tacit implication that project managers are responsible for delivering outcomes?

The third outcome-related entry in the Standard, S3, lists nine groups of stakeholders as potential audiences. The first of these nominates people who "Are responsible or accountable for delivering project outcomes", as follows.

S3	# [***The audience for this standard*** include people who] are responsible or accountable for delivering project outcomes. (PMI 2021:S5)

Since PMI 2021 is very much a project management publication, and not likely to be widely read by non-project people, this quotation could most certainly be interpreted as implying that project managers are responsible or accountable for delivering outcomes.

This implication is supported, at least in part, by some other entries in PMI 2021 regarding project teams. The first of these specifically nominates the project team as being responsible for actively delivering the outcomes, benefits and value.

Entry S6. The project team actively delivers the outcomes, benefits, and value?

S6	➢ Regardless of how projects are coordinated, the collective effort of the project team delivers the outcomes, benefits, and value. The project team may be supported by additional functions depending on the deliverables, industry, organization and other variables. (PMI 2021:S13)

The statement that "the project team delivers the outcomes, benefits, and value" is surely quite extraordinary. It certainly does not reflect what actually happens in practice, at least in my experience, and that of project management colleagues.

Amongst other things, it implies that the ultimate users are passive recipients of pre-packaged outcomes, benefits and value – which, of course, is simply not the case. As discussed above, the users must be, and are, actively involved in the achievement of these goals, and are responsible for these achievements.

Further, the statement in the first sentence of S6 directly contradicts the previous group of entries – S8 in particular – which emphasise the role of customers and end users in achieving outcomes. Before looking further into this contradiction, we will post another entry from PMI 2021 which also implies project team responsibility for outcomes.

Entry S13. Project team takes collective ownership of the project outcomes?

S13	# Regardless of who is accountable or responsible for specific project work, a collaborative project team takes collective ownership of the project outcomes (PMI 2021:S30)

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What could this possibly mean? Ownership of the outcomes is surely with the customer and/or end user. If "ownership" is being used in a colloquial sense, the meaning of this quotation should be spelled out. Otherwise, it should surely be eliminated.

Two further entries which link project teams with achieving outcomes

S16	✓ To support value realization from projects, project teams shift focus from deliverables to the intended outcomes. Doing so allows project teams to deliver on the vision or purpose of the projects, rather than simply creating a specific deliverable. (PMI 2021:S36)

This quotation does not spell out, or even hint at, what the project team actually does in shifting its focus from deliverables to the intended outcomes – let alone how this "allows project teams to deliver on the vision or purpose of the projects". In the absence of any such substantive supporting material, this quotation is unhelpful.

S21	✓ Project teams should think beyond the end of the project to the operational state of the project's deliverable, so that intended outcomes are realized. (PMI 2021:S38)

Many writers urge project managers to keep the [customer's] desired outcomes in mind in the course of managing the project and delivering its outputs. There can be little argument about the desirability of doing this. However, the phrase "so that intended outcomes are realized" is going far too far – operational "keeping in mind" can only help indirectly. Another relevant point is that, all too often, project management is not involved in initiating activities, and through this, or other causes, simply does not know the nature of the customer's desired outcomes.

THE ABOVE TWO ENTRY GROUPS SHOW CONTRADICTING RESPONSIBILITIES

Outcomes achieved by users of deliverables vs. delivered ready-made by PM

The first group of entries discussed above very clearly indicate that it is the users who ultimately convert the project outputs/deliverables into outcomes. Indeed, it was noted that it is difficult to see how the achievement of broader outcomes can be realistically discussed without including the role of the users of project deliverables.

On the other hand, the second group of entries directly say, or imply, that "the project team delivers the outcomes, benefits, and value". Users are not mentioned, but it has already been argued that outcomes derive from the use of project deliverables, and it can only be the users of these deliverables who can achieve their own outcomes.

It is therefore argued that outcomes cannot be delivered by an outsider such as a project team – nor can the latter be held responsible for the achievement of end outcomes. The latter argument is supported by some quotations from the project management literature, as follows.

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Some dissentions in the literature about PM being responsible for end outcomes

There is substantially more mention of benefits than of outcomes in the broader project management literature, although some writers, such as Dalcher 2016, mention both – e.g.

> ….outcomes occur beyond delivery and handover. More critically, benefits accrue over an extended time period as the new or improved asset or system goes into use.

Driver & Seath 2015 use the term "benefits", but also appear to include outcomes, in the following refutation of PM responsibilities for outcomes and benefits.

> Of course, most Project and Programme Managers will understand that they can't "realize" benefits since the majority of benefits come about after a project has finished and people start making use of the things that have been created.

With regard to his interpretation of the PMI 2021 perception of responsibilities for delivering outcomes, Smith 2022 had the following to say (his emphasis):

> ….PMI's new holistic approach <u>broadens the Project Management Team's scope of responsibilities</u> to encompass *effective delivery of Outcomes.*
>
> ….. ***encumbering project managers and teams with additional responsibility for Outcome achievement is not only misdirected, but is <u>completely unrealistic</u>; as Outcome attainment is totally beyond their control.***

The latter statement reflects not only Smith's experience, but also my own, and that of most other project managers with whom I have discussed this question.

On balance, the above discussions rather emphatically rebuff claims and/or implications that project management is responsible for the achievement of end outcomes.

There is a broad consensus that users, rather than PMs, achieve end outcomes

The above arguments most certainly point to users being the parties responsible for achieving end outcomes, rather than project management. As Driver & Seath 2015 said,

> It is essential for Project and Programme Managers to understand that users of Results are the main actors in any strategy.

This certainly reflects my own experience, and those of all my peers who have worked with organisations that provided project management services to external clients. In this very common context, there is no doubt about who the key players are. The client users are the centre stage actors. The projects, and project management are essentially support players.

This suggests that the role of users should be given greater prominence in relevant discussions of post-delivery outcomes in PMI 2021.

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TOWARDS DEVELOPING A STRONGER FOCUS ON USER ROLES IN PMI 2021

There appear to be several opportunities for developing a more intensive focus on the roles of users with relatively straightforward extensions from existing user-related entries in PMI 2021. We will further discuss such opportunities under the following headings.

- Existing entries in PMI 2021 which already include involvement by users
- Existing entries which include active use of deliverables [but not actual users]
- Enhancing three post-delivery entries by adding the roles of users
- Non-specified outcome entries to which the role of users can also be readily added
- Changing a projects-deliver-outcomes entry to a user of project deliverables one
- Potential for further developing a stronger focus on user roles in PMI 2021

Existing entries in PMI 2021 which already include involvement by users

We start by identifying three existing entries which already include some form of involvement of users. I have excluded more generalised entries which do not include actual involvement of users.

S8	➢ The customer and end user are not always synonymous. For the purpose of this standard, the customer is defined as the individual or group who has requested or is funding the project. The end user is the individual or group who will experience the direct use of the project deliverable. (PMI 2021:S13)

S9	➢ Projects need clear directions from customers and end users regarding project requirements, outcomes, and expectations. … In some projects, a representative of the customer or client participates in the project team. The customer and end user input and feedback needs are determined by the nature of the project and the guidance or direction required. (PMI 2021:S14)

S15	➢ Value, including outcomes from the perspective of the customer or end user, is the ultimate success indicator and driver of projects. Value focuses on the outcomes of the deliverables. (PMI 2021:S34)

Existing entries which include active use of deliverables [but not actual users]

The following two entries specifically discuss the use of deliverables to produce/realise the outcomes. They do not specifically mention the actual users, but – perhaps redundantly – I have indicated their implied presence by adding the *[by users]* tag.

S4	➢ The components of a value delivery system create deliverables, which are used *[by users]* to produce outcomes. An outcome is the end result or consequence of a process or a project. The outcomes create benefits, which are the gains realized by the organization. Benefits, in turn, create value, which is something of worth, importance, or usefulness. (PMI 2021:S10)

S18	✓ By working with organizational leaders who are responsible for putting project deliverables into use *[by users]* project leaders can make sure that the deliverables are positioned to realize the planned outcomes. (PMI 2021:S36)

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Enhancing three post-delivery entries by adding the roles of users

We start with two entries which use the verb "enable" to link projects with post-delivery outcomes. They do this in ways that suggest "enable" is shorthand for a broader meaning, along the lines of the following definition from the Cambridge Dictionary.

Enable: *to make someone able to do something or to make something possible*

The essence of this definition is captured in the question "*enable whom*?" In the context of projects, I have described the "someone" as "users" of project outputs, and believe that the existing entries in the left hand text boxes are enhanced by appropriate addition of "users" as shown bolded in the italicised right hand versions of these entries, which make it clear that it is users who achieve the outcomes.

Entry S1 is from the Introduction to the Standard, and is the first sentence in its "1.1 The Purpose of the Standard for Project Management". Its "extended outcomes" is evidently synonymous with what I have described as post-delivery outcomes. The suggested enhancement in the right hand text box appears to me to introduce the role of users to the Standard in a very natural way.

S1	✓ The Standard for Project Management provides a basis for understanding project management and how it enables extended outcomes. (PMI 2021:S3)

S1	✓ *The Standard for Project Management provides a basis for understanding project management and how it enables **users to achieve** extended outcomes.*

S7	✓ ....other functions may be necessary to enable project deliverables that produce the desired outcomes. (PMI 2021:S13)

S7	✓ *…….other functions may be necessary to enable **users of** project deliverables to produce the desired outcomes.*

The third entry in this group, S17, explicitly states that the project output on its own does not enable the outcomes. It points out that it is the use of this output, in this case by trained and coached people, who achieve the outcome. Although it may labour the point a little to add "users" to describe those who are trained and coached, it is still a very simple matter to augment the last sentence, as shown in the right hand text box.

S17	✓ While the deliverable may support the intended project outcome, it may not fully achieve the vision or purpose of the project. For example, customers may want a specific software solution ….The software is the output of the project, but the software itself does not enable the productivity outcome … In this case, adding a new deliverable of training and coaching on the use of the software can enable a better productivity outcome. (PMI 2021:S36)

S17	✓ *While the deliverable may support the intended project outcome, it may not fully achieve the vision or purpose of the project. For example, customers may want a specific software solution ….The software is the output of the project, but the software itself does not enable the productivity outcome … In this case, adding a new deliverable of training and coaching on the use of the software can enable **the users to achieve** a better productivity outcome.*

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Non-specified outcome entries to which the role of users can be readily added

The following two entries which include the verb "enable" are in the "Which type of outcome?" category shown in Figure 1 – i.e. entries with undefined outcomes, which could be deliverables/outputs, or post-delivery outcomes, or other types of outcomes. However, they are included, along with a version which adds users, to give a sense of how the addition of users helps spell out what is actually entailed in practice.

S12	# By fostering inclusive and collaborative environments, knowledge and expertise are more freely exchanged, which in turn enable better project outcomes. (PMI 2021:S29)

S12	# *By fostering inclusive and collaborative environments, knowledge and expertise are more freely exchanged, which in turn enable **users to achieve** better outcomes.*

S14	# Stakeholder engagements also enable opportunities for stronger project performance and outcomes …. (PMI 2021:S33)

S14	# *Stakeholder engagements also enable **users to discover further** opportunities for stronger project performance and outcomes ….*

Changing a projects-deliver-outcomes entry to a user of project deliverables one

We return here to Entry S6, which we first discussed in an earlier major section on "ENTRIES INDICATING THAT PM IS RESPONSIBLE FOR ACHIEVING OUTCOMES". The first sentence of that entry, which is reproduced in the left hand text box below, states that the project team delivers the outcomes, benefits, and value.

This was refuted by subsequent discussions, which argued that it is users of project outputs who achieve outcomes, benefits, and value. So, I have changed this entry to embrace the latter meaning by the simple addition of "***outputs which enable users to achieve the [objectives]***" as shown bolded in the right hand italicised text box.

S6	➤ Regardless of how projects are coordinated, the collective effort of the project team delivers the outcomes, benefits, and value. (PMI 2021:S13)

S6	➤ *Regardless of how projects are coordinated, the collective effort of the project team delivers the **outputs which enable users to achieve the** outcomes, benefits, and value.*

Potential for further developing a stronger focus on user roles in PMI 2021

There is no doubt that recasting PMI 2021 to achieve a stronger focus on user roles would entail a good deal more than simply adding the above types of user roles to relevant entries. I don't know how much broader re-writing would be needed to make it all come together. However, the above examples cover a significant number of the relevant outcomes-related entries – and they emerged so naturally that I believe that a broader recasting of PMI 2021 to focus on user roles is probably quite readily achievable.

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An advantage in including users in this way is that it can be done without needing to specifically set down what the users actually do to achieve the outcomes – which would take PMI into territory beyond the usual project management domain.

REVIEWING FORMS OF PM INVOLVEMENT/NON-INVOLVEMENT IN OUTCOMES

Discussions to date have established that it is the users of project outputs who are responsible for achieving post-delivery outcomes – and not project management, as is stated or implied in many of the entries in PMI 2021. This then leads us to the question about what project management can, or cannot, actively contribute to help achieve post-delivery outcomes. There appear to be three broad scenarios

- Contexts in which the delivering project manager is also the user
- Contexts in which PM can and does help users achieve outcomes
- Contexts in which PM cannot help users achieve outcomes

Regarding the first context, I have not personally experienced cases where the delivering project manager is also the user of the project outputs. However, I have been reliably informed that such cases do occur. One informant cited a particular US defence context. Another pointed to certain Turnkey contracts where the commissioning project manager has switched roles to become the user and operator. None-the-less, these evidently represent only a tiny percentage of all project contexts, and will not be further discussed in this article.

With regard to the other two contexts, both have been expressed in terms of helping (or not being able to help) users of project outputs achieve the post-delivery outcomes. This is because, although it has been established that PM is not normally responsible for achieving such outcomes, it is quite often involved in helping users do so.

The words "quite often" also imply that there are some contexts in which project management cannot help users achieve outcomes, as now discussed.

Contexts in which project management cannot help users achieve outcomes

We will look at two broad sub-contexts.

Project management can only help users if invited (formally or informally)

Project management can only help users achieve outcomes if it is invited to do so, either formally or informally, by the users, or user representatives.

I note here that, with Civil & Civic design-and-construct projects, the practice of governance by Project Control Groups (PCGs), which included senior client representatives, made it much easier for us to continue helping clients achieve their outcomes after project delivery, even if this was not formally provided for in the

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contract. But we always pressed for such involvement, to help secure our ultimate aim of having satisfied customers, and a corresponding reputation for quality of service.

I have not seen any data which indicate the extent to which project management actually helps users achieve their outcomes in practice. Whilst it is certainly true that this very frequently happens, it is also important to recognise that there are very many contexts in which project management cannot help users in this way.

Some typical contexts in which PM is not normally in a position to help users

Undoubtedly, the most conspicuous of the contexts in which PM is not normally able to help users achieve outcomes on an ongoing basis are those associated with long-term fixed asset project deliverables, such as:

- o public infrastructure (e.g. transportation facilities, water supply, energy supply)
- o natural resource development (e.g. mining, oil and gas)
- o major commercial manufacturing and processing facilities
- o buildings
- o aerospace, defence assets
- o other long-term assets

A common attribute of these contexts is their long duration. A consequence of the latter is that many outcomes, and ensuing benefits, are achieved over long periods of time. For example, in the context of the provision of roads in the Queensland Department of Main Roads, McGrath 2007, said

> Project management cannot be held accountable for actually realising the benefits from a project, as the delivery team will generally move on when the project is finished. Only the organisation that has the new asset delivered and/or the organisation that subsequently operates it can realise the benefit.

Long periods of time in this context are typically expressed in decades – but can even extend over a century, as is exampled by the Bingham Canyon mine in Utah.

So, in most such instances, after delivering the project output, and perhaps helping get things under way, the delivering project managers have long since moved on, and have no further involvement of any kind in the longer-term achievement of outcomes.

Importantly for the purposes of this commentary, it is noted that this "no-further-PM-help-with-outcomes" context appears to be by far the most prominent in the project management landscape at large – almost certainly in terms of total monetary value, and possibly also in terms of some other criteria.

In these circumstances, PMI 2021's "stronger focus on outcomes rather than deliverables" would not be relevant for very many, if not the majority, of projects. This is yet another factor to be considered in any revisions which include discussion of post-delivery outcomes.

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Contexts in which project management can & does help users achieve outcomes

I have not seen any data about contexts in which project management can and/or does help users achieve post-delivery outcomes – let alone any classification that I can draw on. So, I will briefly discuss contexts I know of under the following broad headings.

- Contexts in which the role of PM helping users can be quite complicated
- Contexts in which the role of PM helping users is relatively straightforward

Contexts in which the role of PM helping users can be quite complicated

I will start with this grouping of user-related contexts, because when there are extensive and intensive interactions between project managers and users of project deliverables, delineating between the two regarding responsibilities for achieving outcome depends largely on clearly defining the nature of the outcomes you are talking about. In such contexts, the single descriptor "post-delivery outcomes" often needs to be further divided into sub-components to help clarify what can become quite complicated situations. Let us first look at some types of Agile-type projects and users.

o *Contexts of many Agile-type projects, with extensive PM interaction with users*

Dalcher 2015 summarised relationships between Agile methods and users as follows.

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.

Agile methods are typically characterised by delivery of successive intermediate outputs, which I have sometimes seen described as outcomes. In a sense they are, but only when the users actually incorporate them into their processes, when they could then be appropriately described as intermediate outcomes. The providers of the Agile services may be very intensively involved in helping this latter process, but the final responsibility for both the intermediate and end outcomes must surely remain with the users.

o *Contexts in which the delivering PM also acts as representative of multiple users*

I have previously recounted my own experience in project managing a major organisational change-related project in Civil & Civic – the development and implementation of an entirely new cost and financial accounting system for the whole organisation in 1961-62 (Murphy 1984:73).

This type of project has multitudinous users. However, because we did not have anyone like a Business Change Manager to formally represent the users, as the project manager I was held responsible for the successful introduction and initial usage of the new system. However, this was an intermediate output/outcome situation. I delivered

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the output, and then helped relevant operational managers and their people learn to use the system to facilitate achievement of their own longer-term outcomes.

We now move on to discuss contexts in which users are represented by a Business Change Manager, or equivalent.

o   *Contexts in which multiple users have a formally designated user representative*

These are somewhat less complicated contexts than the previous two, and might be seen as a bridge to the next relatively straightforward contexts. But I have included this group here because the materials in its primary exemplar, the UK's *Managing Successful Programmes* (MSP) (e.g. OGC 2007), lean towards complication. With this exemplar we are talking about program management, and about Business Change Managers who represent the ultimate users of transformational change programs. This publication focuses very much on the work that the program manager needs to do – but also makes the point that the Business Change Manager (BCM) is ultimately responsible for the achievement of planned outcomes. Here, the program management role can most certainly be seen as one of helping the users representative achieve those outcomes.

Contexts in which the role of PM helping users is relatively straightforward

I briefly discuss examples of two relatively straightforward PM helping roles from my own experience.

o   *Providing early help to external client users in converting deliveries to outcomes*
    This can take many forms. The most familiar is probably PM helping external clients with their start-up operations start-up – for example, helping with the commissioning of a new industrial plant.

o   *Helping in-company users convert new/improved product/service project outputs from R&D into ready-for-sale formats*

I have included this example mainly because of my own experience in helping intermediate users such as product managers convert some of the outputs from my R&D department into formats which could then be offered for external sale.

I recognise that the above probably covers only some of the potential contexts in which project management can and does help users achieve outcomes. There are also likely to be more helpful useful of classifying such contexts. I believe it is important to establish and set down the various contexts in which project management can help users achieve their end outcomes – when circumstances allow them to do so.

More specifically, in the context of this article, there would appear to be an opportunity for PMI 2021 to collect, consolidate, and classify relevant materials in the wider PM literature, and add appropriate guidelines for project managers to help users achieve outcomes, when this is feasible.

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SUMMARY/DISCUSSION OF THIS ARTICLE

This is the second of a two-part commentary on inconsistent and contradictory entries in PMI 2021 with regard to outcomes, and responsibilities for post-delivery outcomes. The first article was primarily concerned with inconsistencies in the meanings and usages of the descriptor "outcomes", and recommended some relatively straightforward changes to provide greater clarity in some of these usages.

This article first discussed two groups of entries in PMI 2021 regarding responsibilities for post-delivery outcomes which contradicted one another, and went on to progress these discussions, as now summarised.

- The first group of entries included one which specifically identified the end user as the user of project deliverables, with implied responsibility for achieving outcomes.

- The other group included an entry which stated that the project team delivers the outcomes, benefits, and value, with implied responsibility for their achievement.

- Ensuing discussions concluded that projects do not deliver outcomes, but that it is the users of project outputs who utilise project outputs to achieve outcomes.

- This suggested a need for increasing the focus on the roles of users in relation to outcomes achievement. Several examples were given in which the role of users can be readily added to many existing outcomes-related entries. The comparative ease of doing so prompted the thought that a broader recasting of PMI 2021 to focus on user roles should be quite readily achievable – and could be done without unduly disrupting the flow of other mainstream components.

- This then led to a review of what project management actually does, or does not, contribute to helping users achieve outcomes. Two main contexts were discussed.

  o Contexts in which PM cannot help users achieve outcomes are very common, and this should be more widely recognised, and acknowledged in the literature

  o Contexts in which PM can help users achieve outcomes can vary widely, as can their intensity and duration. There would appear to be an opportunity for PMI 2021 to collect, consolidate, and classify relevant materials in the wider PM literature, and thence add appropriate guidelines for project managers to help users achieve outcomes (when they are in a position to do so).

Three mainstream issues in relation to changing the emphasis on post-delivery outcomes in PMI 2021 guidelines have emerged from the above.

- A much stronger focus on the roles of users in achieving post-delivery outcomes has been recommended, along with some examples of potential amendments

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- It has also been recommended the development and addition of guidelines for project management to help users achieve outcomes

- If either, or both of these recommendations were adopted, appropriate amendments would need to be made to the statements of intention in Entries P1 and P2, (parts of which are quoted in the Introduction) as well as to many relevant later entries.

CONCLUDING THIS TWO-PART COMMENTARY

My main concern with this two-part commentary has been with the way PMI 2021 has handled "outcomes". It is one thing to urge project managers to keep the broader outcomes in mind as they execute their projects and deliver their outputs. This is entirely reasonable. After all, the reason the project is undertaken in the first place is to provide the customer, end user, or equivalent, with deliverables which will help them achieve certain outcomes. But PMI 2021 evidently had more than "keeping the broader outcomes in mind" with its stated intention to put "a stronger focus on outcomes rather than deliverables".

The first article was primarily concerned with substantial inconsistencies in the meanings give to, and consequent usages of, the descriptor "outcomes" in PMI 2021. I was able to suggest some fairly straightforward approaches for dealing with many of these.

In contrast, the second article, which has been primarily concerned with how post-delivery outcomes have been handled in PMI 2021, has raised more complicated issues, which are not so readily resolved. I have suggested approaches to focusing much more attention on the roles of users in achieving post-delivery outcomes, and on roles of project management in helping them do so in situations where this is possible.

I want to reinforce an earlier note here – namely that, although these latter issues have been discussed in the context of PMI 2021, this Standard and PMBOK Guide are not alone in their comparative neglect of the role of users in establishing and achieving outcomes. As I noted earlier, this under-representation of users has long been a feature in most of the project management literature at large.

Several writers, including myself, have taken issue with this over the years – but our efforts do not appear to have had any significant impact. One of the reasons I have chosen to critique this aspect of PMI 2021 is in the hope that, by associating the user issue with such a prominent document, this may help draw increased attention to the importance of the active involvement of users in our discussions and documentation of project management processes and aspirations – and, of course, in practice.

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APPENDIX A. OUTCOMES-RELATED QUOTATIONS ("ENTRIES") FROM THE PREFACE AND THE STANDARD IN PMI 2021 (Sheet 1 of 2)

SECTION	SUBSECTION		QUOTATIONS
PMI 2021 PREFACE	**Sustaining the relevance of the PMBOK Guide**	P1	✓ Transformed organizational models have yielded new project work and team structures, the need for a broad range of approaches to project and product delivery, and a stronger focus on outcomes rather than deliverables (PMI 2021:Px)
	Summary of changes	P2	✓ Therefore this edition shifts to a principle-based standard to support effective project management and to focus more on intended outcomes rather than deliverables (PMI 2021:Px)
		P3	✓ *The Standard for Project Management* and the *PMBOK Guide* emphasize that projects do not simply produce outputs, but more importantly, enable those outputs to drive outcomes that ultimately deliver value to the organization and its stakeholders (PMI 2021:Pxi)
PMI 2021 STANDARD	*INTRODUCTION*		
	Purpose of *The Standard for Project Management*	S1	✓ The Standard for Project Management provides a basis for understanding project management and how it enables extended outcomes (PMI 2021:S3).
	Key terms and concepts	S2	✓ **Outcome:** An end result or consequence of a process or project. Outcomes can include outputs and artefacts, but have a broader intent by focusing on the benefits and value that the project was undertaken to deliver. (PMI 2021:S4)
	Audience for this standard	S3	# [Those who] are responsible or accountable for delivering project outcomes. (PMI 2021:S5)
	A SYSTEM OF VALUE DELIVERY		
	Creating value	S4	➢ The components of a value delivery system create deliverables, which are used to produce outcomes. An outcome is the end result or consequence of a process or a project. The outcomes create benefits, which are the gains realized by the organization. Benefits, in turn, create value, which is something of worth, importance, or usefulness. (PMI 2021:S10)
	Organisational governance systems	S5	❖ Governance systems provide an integrated structure for evaluating changes, issues and risks …… This includes …. deliverables produced by projects (PMI 2021:S12)
	Functions associated with projects	S6	➢ Regardless of how projects are coordinated, the collective effort of the project team delivers the outcomes, benefits, and value. The project team may be supported by additional functions depending on the deliverables, industry, organization and other variables. (PMI 2021:S13)
		S7	✓ …….other functions may be necessary to enable project deliverables that produce the desired outcomes. (PMI 2021:S13)
		S8	➢ The customer and end user are not always synonymous. For the purpose of this standard, the customer is defined as the individual or group who has requested or is funding the project. The end user is the individual or group who will experience the direct use of the project deliverable. (PMI 2021:S13)
		S9	➢ Projects need clear directions from customers and end users regarding project requirements, outcomes, and expectations. … In some projects, a representative of the customer or client participates in the project team. The customer and end user input and feedback needs are determined by the nature of the project and the guidance or direction required. (PMI 2021:S14)
	The project environment	S10	❖ The goal is to maximise the value of the project deliverable. (PMI 2021:S15)
	Product management considerations	S11	❖ Programs and projects with deliverables that include products use a tailored and integrated approach that incorporates all of the relevant bodies of knowledge and their related practices, methods, and artefacts. . (PMI 2021:S20)

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APPENDIX A (Continued). OUTCOMES-RELATED QUOTATIONS ("ENTRIES") FROM THE PREFACE AND THE STANDARD IN PMI 2021 (Sheet 2 of 2)

SECTION	SUBSECTION	QUOTATIONS	
PMI 2021 STANDARD (continued)	**PROJECT MGT. PRINCIPLES**		
	Be diligent/respectful/caring stewards		
	Create a collaborative project team environment	S12	# By fostering inclusive and collaborative environments, knowledge and expertise are more freely exchanged, which in turn enable better project outcomes. (PMI 2021:S29)
		S13	# Regardless of who is accountable or responsible for specific project work, a collaborative project team takes collective ownership of the project outcomes. (PMI 2021:S30)
	Effectively engage with stakeholders	S14	# Stakeholder engagements also enable opportunities for stronger project performance and outcomes …. (PMI 2021:S33)
	Focus on value	S15	➢ Value, including outcomes from the perspective of the customer or end user, is the ultimate success indicator and driver of projects. Value focuses on the outcomes of the deliverables. (PMI 2021:S34)
		S16	✓ To support value realization from projects, project teams shift focus from deliverables to the intended outcomes. Doing so allows project teams to deliver on the vision or purpose of the projects, rather than simply creating a specific deliverable. (PMI
		S17	✓ While the deliverable may support the intended project outcome, it may not fully achieve the vision or purpose of the project. For example, customers may want a specific software solution ….The software is the output of the project, but the software itself does not enable the productivity outcome … In this case, adding a new deliverable of training and coaching on the use of the software can enable a better productivity outcome. (PMI 2021:S36)
		S18	✓ By working with organizational leaders who are responsible for putting project deliverables into use, project leaders can make sure that the deliverables are positioned to realize the planned outcomes. (PMI 2021:S36)
	Recognise, evaluate, respond to system interactions	S19	❖ The project may also have subsystems that are required to integrate effectively to deliver the intended outcome. For example, when individual project teams develop separate components of a deliverable, all components should integrate effectively. (PMI 2021:S37)
		S20	❖ Ability to adjust to the changing needs of the end user, sponsor, or customer of the project deliverables. (PMI 2021:S39)
		S21	✓ Project teams should think beyond the end of the project to the operational state of the project's deliverable, so that intended outcomes are realized. (PMI 2021:S38)
		S22	✓ Use of integrated methods, artefacts and practices so there is a common understanding of project work, deliverables and outcomes (PMI 2021:S39)
	Demonstrate leadership behaviours	S23	# Effective leadership promotes project success and contributes to positive project outcomes (PMI 2021:S40)
	Tailor based on context	S24	# Project success is based on adapting to the unique context of the project to determine the most appropriate methods of producing the desired outcomes. (PMI 2021:S44)
	Build quality into process/outputs	S25	❖ Quality focuses on meeting acceptance criteria for deliverables (PMI 2021:S47)
	Navigate complexity	S26	❖ Being vigilant for indications of complexity allows project teams to adapt their approaches and plans to navigte potential disruption in effective project delivery PMI 2021:S52)
	Optimise risk responses	S27	# Continually evaluate exposure to risk, both opportunities and threats, to maximize positive impacts and minimize negative impacts to the project and its outcomes. (PMI 2021:S53)
	Embrace adaptability and resiliency	S28	✓ A focus on outcomes rather than outputs facilitates adaptability (PMI 2021:S55)
	Enable change to achieve the envisioned future	S29	➢ Prepare those impacted for the adoption and sustainment of new and different behaviours and processes required for the transition from the current state to the intended future state created by the project outcomes. (PMI 2021:S58)

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APPENDIX B. OUTCOMES-RELATED QUOTATIONS ("ENTRIES") FROM THE PMBOK GUIDE IN PMI 2021 – PROJECT PERFORMANCE DOMAINS (Sheet 1 of 2)
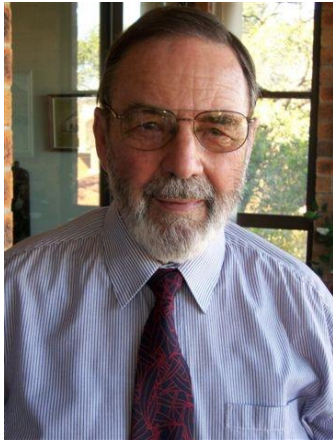
(The order of Performance Domains in this appendix is slightly different from PMI 2021, to facilitate compaction of all these entries. I have also excluded details on the "Check" side of the tables for many of the "Pre-delivery results" entries, for the same reason.)

Effective execution of this performance domain results in the following desired outcomes		Outcomes	Check
STAKEHOLDER Performance Domain (Adapted from PMI 2021:G15 Table 2-2)	G1	⚓ A productive working relationship with stakeholders throughout the project	Productive working relationships with stakeholders can be observed However the movement of stakeholders along a continuum of engagement can indicate the relative level of satisfaction with the project
	G2	⚓ Stakeholder agreement with project objectives	A significant number of changes or modifications to the project and product requirements in addition to the scope may indicate stakeholders are not engaged or aligned with the project objectives
	G3	❖ Stakeholders who are project beneficiaries are supportive and satisfied. Stakeholders who oppose the project or its deliverables do not negatively impact project results	Stakeholder behaviour can indicate whether project beneficiaries are satisfied and supportive of the project or whether they oppose it. Surveys, interviews, and focus groups are also effective ways to determine if stakeholders are satisfied and supportive or if they oppose the project and its deliverables. ....
TEAM Performance Domain (Adapted from PMI 2021:G31 Table 2-3)	G4	✓ Shared ownership	All project team members know the vision and objectives. The project team owns the deliverables and outcomes of The project
	G5	⚓ A high performing team	The project team trusts each other and collaborates. The project team adapts to changing situations and is resilient in the face of challenges. The project team feels empowered, and empowers and recognised members of the project team
	G6	⚓ Applicable leadership and other interpersonal skills are demonstrated by all project team members	Project team members apply critical thinking and interpersonal skills. Project team member leadership styles are appropriate to the project context and environment. ......
DEVELOPMENT APPROACH AND LIFE CYCLE Performance Domain (Adapted from PMI 2021:G50 Table 2-5)	G7	❖ Development approaches that are consistent with project deliverables	The development approach to deliverables [predictive,hybrid or adaptive] reflects the product variables and is appropriate given the project and organisational variables
	G8	⚓ A project life cycle consisting of phases that connect the delivery of business and stakeholder value from the project	Project work from launch to close is represented in the project phases. Phases include appropriate end criteria.
	G9	❖ Project life cycle phases that facilitate the delivery cadence and development approach required to product the project deliverables	The cadence for development, testing, and deploying is represented in the life cycle phases. Projects with multiple deliverables that have different delivery cadences and development methods are represented by overlapping phases of phase repetitions, as necessary
DELIVERY Performance Domain (Adapted from PMI 2021:G92 Table 2-8)	G10	❖ Projects contribute to business objectives and advancement of strategy	The business plan and the organisational strategic plan, along with the project authorising documents, demonstrate that the project deliverables and business objectives are aligned
	G11	# Projects deliver the outcomes they were initiated to deliver	The business case and underlying data indicate the project is still on track to realise the intended outcomes
	G12	# Project benefits are realised in the time frame in which they were planned	The benefits realisation plan, business case, and/or schedule indicate that the financial metrics and scheduled deliveries are being achieved as planned
	G13	⚓ The project team has a clear understanding of requirements	In predictive development, little change in the initial requirements reflects understanding. In projects where requirements are evolving a clear understanding of requirements may not take place until well into the project.
	G14	❖ Stakeholders accept and are satisfied with project deliverables	Interviews, observation, and end user feedbackindicate stakeholder satisfaction with deliverables. Levels of complaints and returns can also be used to indicate satisfaction

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APPENDIX B. OUTCOMES-RELATED QUOTATIONS ("ENTRIES") FROM THE PMBOK GUIDE IN PMI 2021 – PROJECT PERFORMANCE DOMAINS (Sheet 2 of 2)

Effective execution of this performance domain results in the following desired outcomes		Outcomes	Check
PLANNING Performance Domain (Adapted from PMI 2021:G68 Table 2-6)	**G15**	The project progresses in an organised, coordinated, and deliberate manner	A performance review of project results against the project baselines and other measurement metrics demonstrate that the project is progressing as planned. Performance variances are within thresholds
	G16	# There is a holistic approach to delivering the project outcomes	The delivery schedule, funding, resource availability, procurement etc., demonstrate that the project is planned in a holistic manner, with no gaps or areas of misalignment.
	G17	✓ Existing information is elaborated to produce the deliverables and outcomes for which the project was undertaken	Initial information about deliverables and requirements compared to current information demonstrates appropriate elaboration. Current information compared to the business case indicate the project will produce the deliverables and outcomes it was undertaken to deliver.
	G18	Time spent planning is appropriated for the situation	
	G19	Planning information is sufficient to manage stakeholder expectations	
	G20	There is a process for adaptation of plans throughout the project, ...	
PROJECT WORK Performance Domain (Adapted from PMI 2021:G79 Table 2-7)	**G21**	Efficient and effective project performance	
	G22	Project processes appropriate for project & environment	
	G23	Appropriate communications with stakeholders	
	G24	Efficient management of physical resources	
	G25	Effective ,management of procurements	
	G26	Improved team capability due to continuous learning and process improvement	
MEASUREMENT Performance Domain (Adapted from PMI 2021:G115 Table 2-9)	**G27**	A reasonable understanding of the state of the project	
	G28	Actionable data to facilitate decision making	
	G29	Timely and appropriate actions to keep project performance on track	
	G30	Achieving targets and generating business value by making informed and timely decisions based on reliable forecasts and evaluations	
UNCERTAINTY Performance Domain (Adapted from PMI 2021:G129 Table 2-10)	**G31**	An awareness of the environment in which projects occur,	
	G32	Proactively exploring and responding to uncertainty	
	G33	An awareness of the interdependencies of multiple variables	
	G34	The capacity to anticipate threats and opportunities	
	G35	Project delivery with little or no negative impact from unseen ..	
	G36	# Realised opportunities to improve project performance and outcomes	Teams use established mechanisms to identify and leverage opportunities
	G37	Cost and schedule reserves used effectively to maintain alignment with project objectives	

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To see more works by Alan Stretton, visit his author showcase in the PM World Library at http://pmworldlibrary.net/authors/alan-stretton/.