

Commentary on the need to focus as much attention on *other strategic work* as on projects in managing organisational strategic initiatives¹

By Alan Stretton

INTRODUCTION

This article essentially extends discussions on one of the eight “potential topics” nominated in Stretton 2023¹, for appropriate project management people or bodies to consider addressing in more detail. The relevant topic concerns the importance of aligning elements of the management of projects with the corresponding strategic positions of the organisation within which they are undertaken – for example, the management of project risk needs to conform with the organisation’s overall risk strategies.

The point of departure for this extended discussion is that projects are normally only one component of specific strategic initiatives that are undertaken to help achieve an organisation’s broader strategic objectives. “*Other strategic work*” is usually also required to help deliver strategic initiatives as balanced, comprehensive packages, to maximise their contribution to the broader strategic objectives.

Types and magnitudes of *other strategic work* can vary very widely – but this additional work is often very important indeed in the context of delivering strategic initiatives as balanced, comprehensive packages. This article will discuss some of the many types of *other strategic work*, and its potential magnitude. It will also look at different approaches which have been taken with regard to management responsibilities for *other strategic work*, and then at possibilities for ensuring that such responsibilities are always clearly allocated and integrated with the overall strategic initiative management processes.

This is followed by visual representations of projects and *other strategic work* in a strategic initiative context, and also the latter within its organisational strategic and operational management contexts. My reason for developing visual representations is to try and reinforce the message in the main body of this article about the importance of taking proper account of *other strategic work*, as well as the projects. Hopefully, such a visual representation of the two together, in a range of broader contexts, might be a useful aide-memoire, at least for some.

We will conclude with the observation that these discussions of *other strategic work* are very incomplete. This important subject is not well covered in the current project

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management literature, and thence appears to be a candidate for a ninth “potential topic”, which is suggested be added to the eight already proposed in Stretton 2023I.

OVERALL ORGANISATIONAL STRATEGIC OBJECTIVES, AND SPECIFIC STRATEGIC INITIATIVES

Projects represented as directly linked to an organisation’s strategic position

In the October 2023 issue of this journal (Stretton 2023I) I discussed “Some potential current and future-related topics for project management to consider addressing in more detail”. The first of these issues, which was labelled PT1 (Potential Topic) was summarised as follows.

PT1 Expositions of the key relevance of an organisation’s strategic position and external contexts as active guidelines for effective project management plans and activities

The essence of the contextual situation pertaining to PT1 in this summary could be represented pictorially, albeit in a very basic format, as in the following model.



Figure 1. A basic model of programs/projects directly linked to organisational contexts

Here, the porous boundaries are meant to represent avenues for the programs/projects to link to, and align with, the organisation’s strategic context. (In turn, the organisational strategic and operations management context must be effectively linked to, and aligned with, its own business, social and environmental contexts.)

However, projects are only part of any specific strategic initiatives undertaken to achieve organisational strategic objectives – other strategic work is also needed

Organisations need to initiate and progress various specific strategic undertakings in order to achieve their broader organisational strategic objectives.

Many contributors to the project management literature quite directly imply that such specific strategic undertakings consist only of programs or projects. (In the following, I will generally use the descriptor *projects* to cover both)

However, a substantial number of other contributors point out that *other strategic work* usually needs to be done, in addition to projects, to deliver such undertakings in

consolidated, ready-to-use formats. Cooke-Davies 2016:259 has used the terminology “*strategic initiative*” to cover this combination, which he describes as follows.

[A strategic initiative is] ‘a project, portfolio of projects, other discrete programme or series of actions undertaken to implement or continue the execution of a strategy, or that is otherwise essential for the successful implementation or execution of a strategy’.

The descriptor *strategic initiatives* is quite widely used, not only in the project management literature, but also in the general management literature (e.g. Kaplan & Norton 2008). It is a relatively unambiguous descriptor, and one I have been using for over five years in many articles in this journal.

Focusing for the present on *other strategic work*, it is first observed that, all too often, it does not get the attention that it appears to deserve, as now discussed in more detail.

THE NATURE AND IMPORTANCE OF *OTHER STRATEGIC WORK*

The nature of *other strategic work*

It is difficult to be all that precise about the nature of *other strategic work*. To paraphrase Buttrick 2016:367, *other strategic work* (“other work”) can be very diverse, and the approach to it has to be determined on a strategic-initiative-by-strategic-initiative basis, depending on the context, and the type of work being undertaken.

PMI 2017, which is concerned with programs, uses the terminology “other program-related activities”), which it describes as follows.

Other program-related activities are work processes or activities that are being conducted to support a program, but that are not directly tied to the subsidiary programs or projects sponsored or conducted by a program.

The best I can do at this stage is to describe *other strategic work* as additional work, over and above prescribed projects/programs, that is usually also required to help progress and deliver consolidated strategic initiative outputs.

Types of *other strategic work*

The literature nominates many types of *other strategic work*, including

- Business change (Dalcher 2017, Hudson 2016)
- Organisational change (Buttrick 2016, Dalcher 2017, Demaria & Sopko 2016, Koch & Lock 2016, Sedlmayer 2016)
- Education, training, behavioural change (Dalcher 2017, Hudson 2016, PMI 2017)
- Operational management/changes (Buttrick 2016, Hudson 2016, PMI 2017)
- Service management, maintenance functions (Buttrick 2016, PMI 2017)

The above items are quite diverse. but mainly appear to share a broad concern with changing some aspects of the organisation and/or its people, including education and the like, to appropriately respond to, prepare for, and/or effectively utilise, a mainstream strategic initiative deliverable, which is commonly represented as a project output.

However, the above is only a relatively small sampling, and it could well be that a more comprehensive coverage would reveal other significant types of *other strategic work*. In view of its importance – which we are about to discuss – it would appear to be highly desirable that its various types should be more thoroughly investigated, and publicised.

The potential magnitude and/or importance of *other strategic work*

When I first discussed *other strategic work* in some detail in Stretton 2018g, I noted that Dalcher 2017 indicated that it could comprise up to 80% of the total investment in realising benefits in an IT system context. I quoted from him as follows:

Realising value from the investment requires action beyond the mere delivery of IT systems; it necessitates real change within the organisation to enable the new systems to be utilised. The change would often impact many other aspects including: the nature of the business itself; business processes; skills and competencies; and the organization. Such change, which is not IT-specific, or even project related, could often account for up to 80% of the total investment.

I also commented that this somewhat dramatically high proportion of *other strategic work* was not all that much out of line with my own experience with substantial internal strategic change initiatives in Civil & Civic, where, in some cases, the scope of the *other strategic work* was more significant than the initial change projects. I exemplified a large IT-related internal project (“Calnet”), where the work of educating users throughout the organisation and helping them to use the new system effectively was actually more substantial than developing the original new system project.

Hudson 2016:432 discussed a somewhat similar situation, as follows.

Programme benefits don't just happen as a result of new IT systems or process capabilities. They need business or behavioural change activities to realize the potential value.

For example, the process design for an IT project may identify operational changes that can be deployed before the system development.

However, the need for, and importance of, other strategic work is not confined to IT strategic initiatives. In the context of quite a different type of program (a “Virtual Centre”), Sedlmayer 2016:310 says,

A fundamental change through a programme can hardly be successful through the programme alone: changing the organizational set-up of the company was essential to unlock endless discussions.

A quite different example of the importance of *other strategic work* was briefly discussed in Stretton 2018g, in relation to BA's Heathrow's Terminal 5, whose construction "was lauded as a success, from a time, cost, scope and quality perspective" (Bourne 2015). However, from its opening in March 2008 flights had to be cancelled, passengers were stranded, and more than 15,000 pieces of baggage were lost. Why?

One of the main basic causes was lack of staff preparation and training in understanding and operating the new facilities, notably in the baggage handling domain.

Bourne ascribes this as a failure "to manage the stakeholder risks associated with transitioning staff to the new facility".

In this article, I am adding the suggestion that, if the focus had been on the totality of Terminal 5 as a strategic initiative, rather than mainly on the physical facilities project, these stakeholders, and their needs, would more likely have been recognised as *other strategic work*, and thence appropriately progressed along with the main project.

The above then rather naturally raises questions about managerial responsibility for executing *other strategic work*. The project management literature indicates that several different approaches have been taken regarding such responsibilities.

Different approaches re management responsibilities for *other strategic work*

The literature indicates that there appear to have been three broadly different perspectives on responsibilities for the management of *other strategic work*:

- *Other strategic work* seen as an integral part of program/project management;
- Some *other strategic work* undertaken by separate programs/projects; and
- Some *other strategic work* undertaken as non-project work

I discussed these in some detail in Stretton 2018g, and also in Stretton 2019a. The following briefly summarises each of these perspectives.

- ***Other strategic work seen as an integral part of program/project management***

If I have interpreted them correctly, this appears to be the dominant perspective of Buttrick 2016, Kock & Lock 2016, and PMI 2017. The implication is that the relevant *other strategic work* is managed by program/project managers.

I discussed this perspective in some detail in Stretton 2018g, and concluded that treating *other strategic work* as an integral part of program/project management would appear to be appropriate only in some relatively limited contexts.

- **Some other strategic work undertaken as separate programs/projects**

This perspective is mentioned or implied in Demaria & Sopko 2016 and Hudson 2016. It was also an approach we sometimes took in the project-based Civil & Civic, in cases where the magnitude and/or importance of the *other strategic work* were sufficiently substantial to warrant doing so. In such cases, the overall strategic initiative effort, including the *other strategic work*, were generally under the management of a program manager.

I suspect such an approach would also tend to be favoured by other project-based organisations. However, in production-based organisations, this perception would appear to be viable only in those organisations with substantial maturity in the program/project context.

- **Some other strategic work is undertaken as non-project work**

This perspective gets little mention in the project management literature, but, from my own experience, appears to be quite common in practice. For example, I found that helping implement new internal systems for which I had been project manager was a perceive-the-need-for-help-and-do-something-about-it type of on-going obligation which was of a distinctly non-program/ project nature (and also rather challenging in many instances). Other colleagues in similar circumstances had much the same experience. However, managing non-project *other strategic work* is not an easy subject to discuss, particularly because the nature of such work can be highly variable, entailing a corresponding variety of managerial skill-sets.

How to ensure that responsibilities for managing *other strategic work* are always clearly allocated, and integrated with overall strategic initiative management?

Evidently there is no one answer to this question. Some possibilities could include the following.

A dedicated strategic initiative manager: Such a manager would automatically be responsible for performance on *other strategic work* as well as the component projects of the relevant strategic initiative. This is a somewhat similar situation to the first bullet-pointed approach discussed above – and indeed project managers would appear to be the most appropriate source of recruitment of strategic initiative managers.

Covered by strategic investment portfolio managers: In some earlier articles, including Stretton 2018f,g, I discussed responsibilities of strategic portfolio managers in relation to portfolios and *other strategic work*. For organisations that are substantial enough to warrant a dedicated strategic investment portfolio facility, responsibility for ensuring that the management of projects and *other strategic work* are both covered would rest with a strategic investment portfolio manager (as this type of portfolio manager is described in Stretton 2022b).

Overall, there simply is not enough information on what happens in practice to be able to discern definite overall patterns, let alone draw conclusions on how best to ensure that responsibilities for managing *other strategic work* are always clearly allocated, and integrated with the overall strategic initiative management.

As was advocated above regarding types of *other strategic work*, it would appear to be highly desirable to also fully investigate how the many types identified have been most effectively managed, and then consolidate findings and recommendations, and ensure that these are given due prominence in the project management literature.

ADDING OTHER STRATEGIC WORK, AND A STRATEGIC INITIATIVE CONTEXT, TO THE ORGANISATIONAL STRATEGIC AND OPERATIONS MGT. CONTEXTS

A basic model with *other strategic work* and a strategic initiative context added to the Figure 1 model



Figure 2. Adding other strategic work and a strategic initiative context to the Figure 1 model

Expanding Figure 2 model by adding stages of the organisational mgt. context

Stretton 2017l introduced a linear organisational strategic framework which specifically identified that both projects and non-project work were involved in helping the achievement of business outcomes and realise benefits. By Stretton 2018f I had grouped these two into the *other strategic work* descriptor.

I had also divided the framework components into the five basic stages which have been used in all subsequent versions of this framework (although the actual descriptors of these stages have been slightly modified from time to time). The latest descriptors of these five stages, as set down in Stretton 2023h, are as follows.

1. Establish/ re- establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives	4. Execute strategic initiatives	5. Achieve organisational strategic objectives.
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I now propose to expand the basic model of Figure 2 as follows.

- By adding the above five stages of the organisational strategic management model.
- By modifying Stages 3 to 4 slightly to represent an individual strategic initiative (rather than all strategic initiatives) involved in helping achieve the overall organisational strategic objectives).
- By re-naming the above “programs/projects” as “component project(s)”, to help emphasis that there is another component – i.e. other strategic work – in the individual strategic initiative.

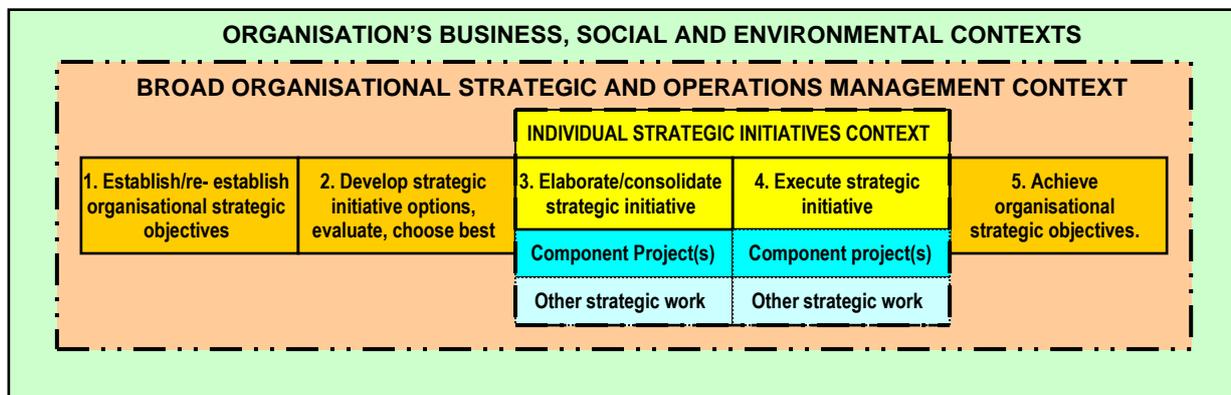


Figure 3. Expanding Figure 2 in the context of five stages of the organisational strategic mgt model

I am not sure how useful this expanded version of the contexts of projects might be. However, as noted in the Introduction, my reason for developing visual representations is to try and reinforce the message in the main body of this article about the importance of taking proper account of *other strategic work*, as well as the projects. Hopefully, such a visual representation of the two together, in a range of broader contexts, might be a useful aide-memoire, at least for some of the more visually oriented people, like myself.

SUMMARY/DISCUSSION

Summary

The key elements of this case for representing projects and *other strategic work* in a strategic initiative context, and within their organisational strategic and operational management contexts, can be summarised as follows.

- Projects are commonly represented as virtually sole contributors to an organisation’s strategic initiatives undertaken to achieve organisational strategic objectives

- In practice, *other strategic work* is usually also required to help deliver comprehensive, balanced strategic initiatives
- Other strategic work is often very important indeed in the context of delivering such strategic initiatives, but does not receive commensurate discussion in the literature.
- This article has discussed some of the many types of *other strategic work*, but a more substantial effort is needed to get a comprehensive coverage of these types
- Three basically different approaches to management responsibilities for *other strategic work* were then outlined. However, discussions of possible ways of ensuring that such responsibilities are always clearly allocated and integrated were inconclusive, and indicate the need for a much deeper investigation.
- Visual presentations were then offered, with separate textboxes for projects and other strategic work, both within a strategic initiative context, which in turn is within an organisational management context, and its business, social and environmental context

Discussion

Overall, the above discussions of *other strategic work* have indicated very substantial inadequacies of real-world information on the range of types of *other strategic work*, and of examples of their effective management in practice. These, plus a lack of recognition of its importance in practice, appear to have contributed to the currently inadequate treatment of *other strategic work* in the project management literature at large.

In light of the above discussions, it appears evident that we would all benefit from a more detailed and comprehensive coverage of this subject by those members of the project management community who are appropriately positioned, and have the resources needed, to address this topic thoroughly and comprehensively.

In the introduction to this article I alluded to my article in the October issue of this journal (Stretton 2023I), in which I nominated eight “potential topics” for appropriate project management people or bodies to consider addressing in more detail. The management of *other strategic work* appears to be a candidate for a ninth “potential topic” (PT). Accordingly, I somewhat tentatively suggest the addition of the following to the eight PTs already proposed in Stretton 2023I.

PT9	An examination of types of <i>other strategic work</i> which normally accompany projects in undertaking organisational strategic initiatives, and of their effective management
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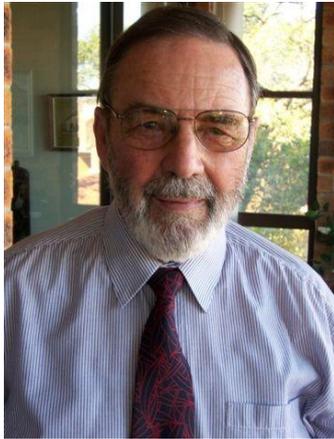
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About the Author



Alan Stretton, PhD

Faculty Corps, University of Management
and Technology, Arlington, VA (USA)

Life Fellow, AIPM (Australia)



Alan Stretton is one of the pioneers of modern project management. He is currently a member of the Faculty Corps for the University of Management & Technology (UMT), USA. In 2006 he retired from a position as Adjunct Professor of Project Management in the Faculty of Design, Architecture and Building at the University of Technology, Sydney (UTS), Australia, which he joined in 1988 to develop and deliver a Master of Project Management program. Prior to joining UTS, Mr. Stretton worked in the building and construction industries in Australia, New Zealand and the USA for some 38 years, which included the project management of construction, R&D, introduction of information and control systems, internal management education programs and organizational change projects. He has degrees in Civil Engineering (BE, Tasmania) and Mathematics (MA, Oxford), and an honorary PhD in strategy, programme and project management (ESC, Lille, France). Alan was Chairman of the Standards (PMBOK) Committee of the Project Management Institute (PMI®) from late 1989 to early 1992. He held a similar position with the Australian Institute of Project Management (AIPM), and was elected a Life Fellow of AIPM in 1996. He was a member of the Core Working Group in the development of the Australian National Competency Standards for Project Management. He has published 250+ professional articles and papers. Alan can be contacted at alanailene@bigpond.com.au.

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