Questioning "project success" as a realistic descriptor for outcomes successfully achieved by other participants at various stages of organisational strategic management processes[1]

By Alan Stretton

INTRODUCTION

Some years ago I wrote an exploratory series of five articles in this journal on project successes and failures (beginning with Stretton 2014j). Those articles raised many questions, but offered few cogent answers. In the main, they highlighted many deficiencies in what the literature had to say about project successes/failures. These were summarised in Stretton 2015e as follows.

- Different project success/failure criteria are being used by different people
- Project success/failure rates data are sparse in most areas
- The data on causes of failure are meagre indeed

In four subsequent articles (Stretton 2018k&l, 2019b, 2020c) I explored the relevance of some published causes of "project" success/failure in an organisational strategic management context. A key finding was summarised in Stretton 2018k as follows.

> We have seen that probably the majority of the causes of so-called "project" failures cannot reasonably be ascribed to failures by project management. Such failures have been identified as being responsibilities of other entities.

It follows that credit for the majority of "project" successes would also be correspondingly ascribed to other entities. This aspect of so-called "project" successes and failures has received little attention in the project management literature. Indeed, as we will see, the descriptor "project success" is still quite commonly used, even when other entities have actually been responsible for, and have achieved, the successes.

This article will explore this situation further. We will look at four examples from the literature which discuss "levels" of "project success", and discuss each of them in the context of how they relate to corresponding stages of an organisational strategic management model. Success will be defined as the achievement of a favourable outcome. Each of the examples has success assessment criteria ("success measures"), most of which relate to outcomes. Considerations of these will broadly confirm that, in post-delivery contexts in particular, achievement of such outcomes is the responsibility of, and is undertaken by, users of project (or later) outputs – and not, as tends to be implied by "project success", by the delivering project management.

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A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT MODEL

An augmented linear basic organisational strategic management model

In the following discussions I will augment a five-stage organisational strategic management model which I have been using for some years (most recently shown in Stretton 2023d) with a sixth stage. I added the latter in a recursive version of the same model in Stretton 2020l, to reflect the circular nature of organisational strategic management processes. The basic format of the recursive model is shown in Figure 1 to the right.
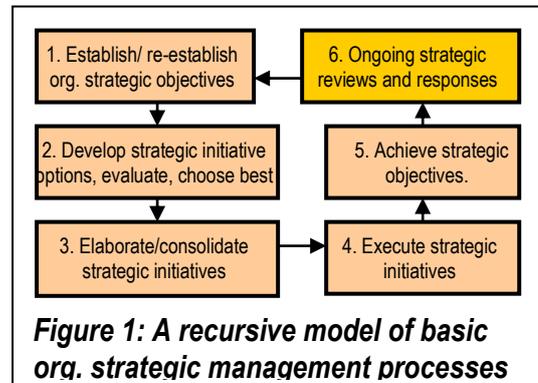

Figure 1: A recursive model of basic org. strategic management processes

I will be using the augmented linear formal shown in Figure 2 below, because this is the most suitable format for aligning these various stages with corresponding levels of "project success" from four different sources, to which we will shortly turn.

A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT MODEL					
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 org. strategic objectives	6. Ongoing strategic reviews & responses
Establish & shape both deliberate & emergent strategic objectives; Confirm desired outcomes	Develop alternative strategic initiatives to achieve strategic outcomes / benefits; Evaluate alternatives; Choose the best	Elaborate & define chosen strategic initiatives/projects; Confirm feasibilities; Prioritise and consolidate	Execute strategic initiative component projects/programs and *other strategic work*	Achieve strategic outcomes and realise benefits	

Figure 2. An augmented basic linear organisational strategic management framework

Strategic initiatives comprise projects plus *other strategic work*

I have long been using strategic initiatives, rather than projects alone, as the primary vehicle for developing and contributing to broader organisational strategic objectives. This is because *other strategic work* needs to be undertaken, as well as projects, to achieve strategic objectives. This was discussed in some detail in Stretton 2023m, in which the following examples of *other strategic work* were listed from various sources.

Business change (two sources); Organisational change (five sources)
Education, training, behavioural change (three sources)
Operational management/changes (three sources)
Service management, maintenance functions (two sources)

Additionally, Dalcher 2017 has pointed out that *other strategic work* can sometimes represent as much as 80% of the total investment in a strategic initiative. In short, it can be a much more important part of strategic initiatives than is commonly acknowledged.

However, the following is primarily concerned with the project components, and I have tried to keep the focus on them where appropriate. I will generally restrict discussion of *other strategic work* to those sections where it is particularly relevant to their contexts.

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This article associates success directly with achievement of favourable outcomes

This article will associate success directly with the achievement of favourable outcomes, in line with the following definition, quoted by Dalcher 2014:33.

The Oxford Dictionary defines success as a favourable outcome, …..

REPRESENTING FOUR EXAMPLES DEPICTING "PROJECT SUCCESS" LEVELS, ALIGNED WITH STAGES OF THE ORGANISATIONAL STRATEGIC MGT. MODEL

Figure 3 is headed by a slightly modified organisational strategic management model. Its Stages 3 and 4 have been combined into one time frame. Stage 5 has been split into two components – one representing the conversion of individual strategic initiative outputs to operational outcomes, and the other representing the contribution of the latter to the broader organisational strategic objectives. These modifications have been made to facilitate alignment with the "project success" levels depicted in the four examples shown there-under.

The descriptors identifying these four examples are shown in the arrowed text boxes on the left. Their "levels" of "project success", together with their primary descriptors, are shown on the right. As can be seen, they appear to align quite well with each other, and with the corresponding stages of the strategic management model.

A (SLIGHTLY MODIFIED) BASIC ORGANISATIONAL STRATEGIC MANAGEMENT MODEL					
1. Establish/ re-establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives (SIs)	5. Achieve organisational strategic objectives.		6. Ongoing strategic reviews & responses
		4. Execute SIs [Projects & other strategic work]	Convert strategic initiative outputs to SI operational outcomes	Monitor contribution of SI operational outcomes to org. strategic objectives	*[Including provision for potential future initiatives]*
Levels of project success (Adapted from Dalcher 2014:Table 2.2)		Level 1: Project management success	Level 2: Project success	Level 3: Business success	Level 4: Future potential
Project success (Adapted from Shenhar & Dvir 2007:Fig 2-1)		*Efficiency*	*Impact on customer Impact on team*	**Business and direct success**	**Preparation for future**
Defining project success (Developed from script, Baccarini 1999)		Project management success	Product success		
Project success dimensions (Adapted from Shenhar et al 1997:Fig. 1)		*Project Efficiency*	*Impact on Customer*	Business Success	Preparing for the Future

Figure 3. Four examples of "project success" levels from the project mgt. literature, aligned with a basic organisational strategic management framework

Following are some general notes on the four examples of "project success" levels, in seriatim from the top, identified by authors.

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Dalcher 2014: I first discussed Dalcher's 2014 four "levels of project success" in the third to fifth articles in my series starting with Stretton 2014j, but in a somewhat different context. I have transposed the contents of his Table 2.2 into the above linear format

Shenhar & Dvir 2007: The original of this example actually has separate entries for "Impact on customer" and "Impact on team", and thence comprises five levels (which the authors described as "dimensions"). I have combined these two to broadly conform to the original four levels of the Shenhar et al 1997 example – mainly because I believe "Impact on team" is most relevant to this stage of the organisational strategic management framework with which both are aligned.

Baccarini 1997: I have included Baccarini mainly because of the "product" component of his "Product success" entry. This appeared to me to be particularly relevant because of the amount of attention which is given to issues like the product life cycle (vs. the project life cycle) in some sections of the literature, and other issues such as those discussed by Patel et al 2023 recently in this journal. It can be seen that I have represented Baccarini's "product success" as covering two of the four "success levels". These allocations follow his descriptors of the components of this entry, as further detailed in the relevant sections of the following commentaries.

Shenhar et al 1997: I have included this example mainly because it has somewhat different success measures – or "success assessment criteria", as I shall call them, from Shenhar & Dvir 2007. I also comment here that "Impact on customer" is a most welcome entry in both examples – I say welcome, because the key role of the customer in the project context is all too often neglected in the project management literature.

A MORE DETAILED LOOK AT EACH OF THE LEVELS OF "PROJECT SUCCESS"

The following analyses look in more detail at each of the four levels of "project success". We first show how each of these levels is described by the relevant author. Some of these could be described as "type-of-success" descriptors – e.g. "project management success" in Figure 4. Others are more like "type-of-assessment-criteria" descriptors – e.g. "efficiency" in Figure 4.

These are followed by the authors' checklists of success assessment criteria (which two authors describe as "success measures"). Westerveld 2003 said that "Research on project success further shows that it is impossible to generate a universal checklist of project success criteria suitable for all projects". However a few of these checklists are quite detailed, and hopefully some people may find them useful. Certain aspects of each example, and its checklists, will then be discussed in more detail, including discussion of the appropriateness of "project success", and other descriptors.

Each figure is headed by the basic organisational strategic management framework from Figure 3. This is followed by a block arrow which indicates the link between the relevant stage of this organisational strategic framework and the level of "project

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success" being discussed. The latter are represented by four groups of columns, which collate and summarise materials from each of the four authors.

1. ORGANISATIONAL STRATEGY, AND FOUR FIRST LEVEL "PROJECT SUCCESS" EXAMPLES

Summarised first level "project success" examples, and assessment criteria

A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT FRAMEWORK					
1. Establish/ re-establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives (SIs)	5. Achieve organisational strategic objectives.		6. Ongoing strategic reviews & responses
		4. Execute SIs [Projects & other strategic work]	Convert SI outputs to SI operational outcomes (en route to benefits)	Monitor contribution of SI operational outcomes to org. strategic objectives	*[Including provision for potential future initiatives]*

1. FOUR EXAMPLES OF "PROJECT SUCCESS" FIRST LEVEL, WITH ASSESSMENT CRITERIA CHECKLISTS			
Levels of project success (Dalcher 2014: Table 2.2)	**Project success** (Shenhar & Dvir 2007: Fig. 2-1)	**Defining project success** (Baccarini 1999)	**Project Success Dimensions** (Shenhar et al 1997)
Level 1: Project mgt. success *Efficiency and performance*	*Efficiency*	**Project management success**	*Project Efficiency (Figure 1)*
Measures for determining success (Table 2.5)	**Specific success measures**	**[Three key components]**	**Meeting design goals (Table 1)**
▪ **Project time** ▪ **Project cost** ▪ **Full scope** ▪ **Functionality**	• **Meeting schedule** • **Meeting budget**	**Meeting time, cost and quality objectives**	**Meeting time goals Meeting budget goals Meeting technical spec's Meeting operational spec's**
▪ Milestones ▪ Project performance data ▪ Number of defects ▪ Earned value management ▪ Use of resources ▪ Agreed scope changes ▪ Change requests	• Other efficiencies	Quality of the project management process	
	• Yield		

Figure 4. Four examples of the first level of "project success", with assessment criteria

Notes on the success assessment criteria ("success measures", etc.) for Level 1

The success criteria for all four basically share time, cost and quality objectives

The basic common elements in the lists of assessment (or measurement) criteria (indicated in bold type in Figure 4) can be summarised by the well known "iron triangle" components listed by Baccarini, namely meeting time, cost and quality objectives. These can be seen as successful outcomes of the work of the project manager and his team, and on this basis alone it would appear to be entirely reasonable to describe this as "project management success", as nominated by two of the authors.

Most of the other criteria are concerned with quality of the internal PM processes

Dalcher has listed seven other assessment criteria, which would appear to be well summarised by Baccarini's "Quality of the project management process" entry, and

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consistent with the "other efficiencies" entry of Shenhar & Dvir. This group of success criteria would also be well covered by the "project management success" descriptor.

"Project management success", rather than "project success", appears to be an appropriate descriptor for Level 1

On the basis of the above notes, the choice of "project management success" as the type-of-success subheadings by Dalcher and Baccarini would appear to be most appropriate.

In similar vein, "project management success" would appear to be a more accurate descriptor that "project success" in the main headings of each example.

2. ORGANISATIONAL STRATEGY, AND FOUR SECOND LEVEL "PROJECT SUCCESS" EXAMPLES

Summarised second level "project success" examples, and assessment criteria

A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT FRAMEWORK					
1. Establish/ re-establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives (SIs)	5. Achieve organisational strategic objectives.		6. Ongoing strategic reviews & responses
		4. Execute SIs [Projects & other strategic work]	**Convert SI outputs to SI operational outcomes** (en route to benefits)	Monitor contribution of SI operational outcomes to org. strategic objectives	*[Including provision for potential future initiatives]*

2. FOUR EXAMPLES OF THE SECOND LEVEL OF "PROJECT SUCCESS", WITH ASSESSMENT CRITERIA CHECKLISTS				
Levels of project success (Dalcher 2014: Table 2.2)	**Project success** (Shenhar & Dvir 2007: Figure 2-1)		**Defining project success** (Baccarini 1999)	**Project Success Dimensions** (Shenhar et al 1997)
Level 2. Project success *Objectives, benefits, stakeholders*	*Impact on customer*	*Impact on team*	**Product success**	*Impact on customer (Fig. 1)*
Measures for determining success (Table 2.5)	Specific success measures		[Two of three components]	Impact on the customer (Table 1)
▪ **Client satisfaction** ▪ *Fulfilled expectations* ▪ *Satisfied objectives*	Customer satisfaction		Satisfaction of users' needs	**Fulfilling customer needs** *Level of customer satisfaction*
▪ *Product/result usable* ▪ *Product/result in use* ▪ *Product/result useful*	*Extent of use*			*Actually used by customer*
▪ Benefits	Benefit to customer			
▪ Satisfied stakeholder needs ▪ Stakeholder satisfaction			Satisfaction of stakeholders' needs where related to project	
▪ Satisfied project requirements	Meeting requirements and specifications			
▪ Complaints	Brand name recognition	Team satisfaction Team morale Skill development Team growth Team retention No burnout		Solving major operational problems

Figure 5. Four examples of the second level of "project success", with assessment criteria

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Notes on the success assessment criteria ("success measures", etc.) for Level 2

Figure 5 shows a substantially mixed bag of success assessment criteria from the four examples at this level. These are grouped into criteria which are shared by two or more of the examples, except for the lowest group, whose individual criteria are not shared.

Client/customer/user satisfaction success criteria are shared by all four examples

The detailed success assessment criteria for all four examples include satisfaction of client, customer and/or user needs, as indicated in bold type-face in Figure 5. This very specific recognition of the importance of clients/customers/users is particularly welcome, as the latter are all too often ignored in our literature. However, what does the success criterion "client/customer/user satisfaction" actually entail in practice? I argue as follows.

- Success has been defined as a favourable outcome
- What form does the outcome "client/customer/user satisfaction" take?
- It is contended that such satisfaction cannot be determined until the client/customer/ user has used the strategic initiative outputs/deliverables, and has successful converted them into operational strategic initiative outcomes.
- This leads us to the next group of success assessment criteria

"Use of deliverables" criteria
- Three of the four examples have "use" of product/result/deliverable criteria
- However, all three are concerned with usefulness and actual use, rather than with outcomes of such use
- It is contended that such "use" in itself does not indicate success, but that it is favourable outcomes from such use which constitute success

On the basis of both of these types of success assessment criteria, it would appear that the type of success at this level could best be described as something like "client/customer/user success in achieving favourable operational strategic initiative outcomes, to which projects have contributed" – or, perhaps a little more succinctly "user successes to which projects have contributed". But, before commenting further, we look briefly at the other shared success criteria in Figure 5.

"Benefits" criteria: Benefits are derived from successful strategic initiative outcomes and other inputs, and usually some time after achievement of individual outcomes. There is therefore a substantial dilution of the extent to which component projects of strategic initiatives contribute to benefits, in both quantitative and durational contexts. It therefore appears inappropriate to represent these as "project success" criteria.

"Stakeholder satisfaction" criteria: This evidently is meant to cover stakeholders in the project itself, rather than stakeholders in the operational strategic initiative outcomes. If this is so, then project stakeholder satisfaction does not appear to be a particularly relevant "project success" criterion at this level.

"Meeting project requirements/specifications" criteria: These appear to belong directly to Level 1, but not to this level.

"Project success" does not appear to be an appropriate descriptor for Level 2

The above discussions on the first two success assessment criteria concluded that "user successes to which projects have contributed" would be a much more accurate heading than "project success" at this level. In furthering these discussions, it is first noted that

The descriptor "project success" could reasonably be seen to imply that project management is responsible for achieving post-delivery outcomes. However, it is the users of project outputs who actually convert the outputs into operational outcomes, and are responsible for achieving them. Therefore "project success" does not appear to be an appropriate descriptor.

If this analysis is correct, then it is reasonable to ask the question as to what project management actually does, or does not, contribute, in helping users achieve outcomes. There appear to be three distinct contextual situations in this regard.

- ***Where the delivering project manager is also the user***
  I have not personally come across such cases, but I am reliably informed that this sometime happens – in which case the descriptor "project success" might be deemed appropriate, although perhaps "project management success" might be more accurate. However, such cases are evidently very rare, so that we will not discuss them further, but move on to discuss the two other contextual situations.

- ***Where delivering project management actively helps users achieve outcomes***
  There are many contexts in which the delivering project management team can actively help users achieve outcomes. These contexts can vary widely, as can the intensity and duration of active help by project management. However, it is important to note that final responsibility for achieving the outcomes remains with the users, and not the helping project management, as can be implied by "project success".

- ***Where delivering project mgt. cannot actively help users achieve outcomes***
  Finally, there are many other contexts in which the delivering project management team cannot actively help users achieve outcomes – for example, with most fixed asset deliverables, where the bulk of the outcomes may not be achieved for years, or decades, and delivering project management has long since moved on. Overall, these comprise a very substantial proportion of the total world of project management practice – perhaps even a dominant one in terms of monetary value. Yet this important context appears to be widely ignored in discussions of "project outcomes". I discussed this in some detail in Stretton 2023k. Certainly, the corresponding "project success" descriptor is a complete misnomer in this context, when interpreted as implying project management responsibility for the success.

In both the latter contexts, which appear to cover virtually all types of project contributions to post-project outcomes, the descriptor "project success" is clearly inappropriate. It has been suggested that "user successes to which projects have contributed", would be a more accurate (albeit not a very succinct) descriptor.

3. ORGANISATIONAL STRATEGY, AND FOUR THIRD LEVEL "PROJECT SUCCESS" EXAMPLES

Summarised third level "project success" examples, and assessment criteria

A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT FRAMEWORK				
1. Establish/ re-establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives (SIs)	**5. Achieve organisational strategic objectives.**	6. Ongoing strategic reviews & responses
		4. Execute SIs [Projects & other strategic work]	Convert SI outputs to SI operational outcomes (en route to benefits) — **Monitor contribution of SI operational outcomes to org. strat. objectives**	*[Including provision for potential future initiatives]*

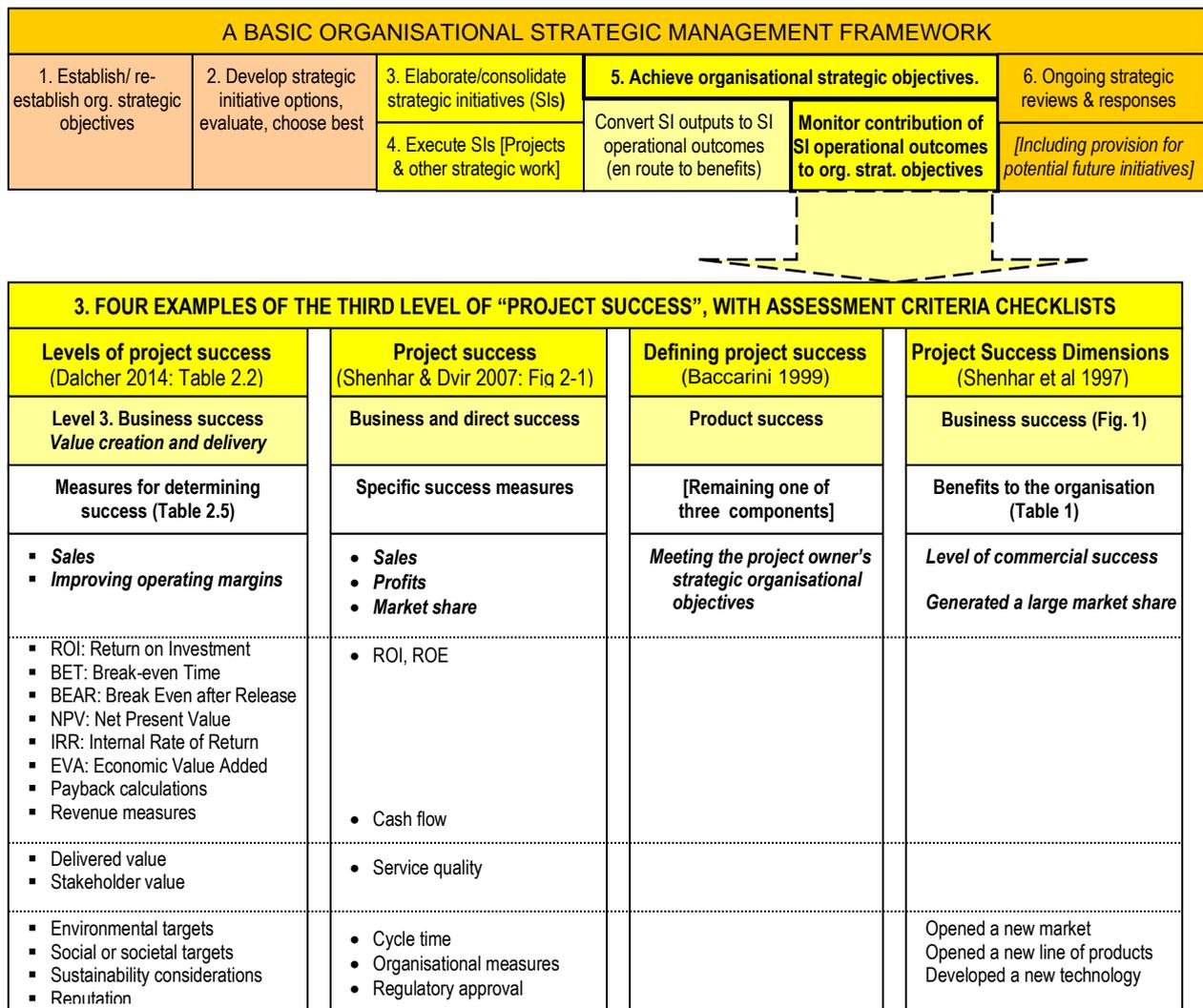| 3. FOUR EXAMPLES OF THE THIRD LEVEL OF "PROJECT SUCCESS", WITH ASSESSMENT CRITERIA CHECKLISTS			
Levels of project success (Dalcher 2014: Table 2.2)	**Project success** (Shenhar & Dvir 2007: Fig 2-1)	**Defining project success** (Baccarini 1999)	**Project Success Dimensions** (Shenhar et al 1997)
Level 3. Business success *Value creation and delivery*	**Business and direct success**	**Product success**	**Business success (Fig. 1)**
Measures for determining success (Table 2.5)	**Specific success measures**	**[Remaining one of three components]**	**Benefits to the organisation (Table 1)**
▪ *Sales* ▪ *Improving operating margins*	• *Sales* • *Profits* • *Market share*	*Meeting the project owner's strategic organisational objectives*	*Level of commercial success* *Generated a large market share*
▪ ROI: Return on Investment ▪ BET: Break-even Time ▪ BEAR: Break Even after Release ▪ NPV: Net Present Value ▪ IRR: Internal Rate of Return ▪ EVA: Economic Value Added ▪ Payback calculations ▪ Revenue measures	• ROI, ROE • Cash flow		
▪ Delivered value ▪ Stakeholder value	• Service quality		
▪ Environmental targets ▪ Social or societal targets ▪ Sustainability considerations ▪ Reputation	• Cycle time • Organisational measures • Regulatory approval		Opened a new market Opened a new line of products Developed a new technology

Figure 6. Four examples of the third level of "project success", with assessment criteria

Notes on the success assessment criteria ("success measures", etc.) for Level 3

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Business (or organisational) success criteria are shared by all four examples

Although the specific criteria vary between the four examples, the entries at the first level in bold type in Figure 6 have to do with "business success" – as indeed is indicated by three of the four subheadings. A reviewer has pointed out that the meaning of "business success" can readily be broadened to cover non-business enterprises, including public organisations such as government agencies, schools, public health systems, aid agencies, and NGOs. In these cases, "organisational success" would be more appropriate than "business success". ("Organisational success" would also align with Baccarini's criterion of achievement of overall organisational strategic objectives.)

The other shared success criteria relate to financial & quality of service measures

These are more detailed criteria directly associated with business success

"Project success" is an even less appropriate descriptor for Level 3 than for L2

The following summarised argument which was made about the inappropriateness of the "project success" descriptor for Level 2 applies even more strongly for Level 3

The descriptor "project success" could reasonably be seen to imply that project management is responsible for achieving post-delivery outcomes. However, it is the users of project outputs who actually convert the outputs into operational outcomes, and are responsible for achieving them. Therefore "project success" does not appear to be an appropriate descriptor.

However, there is also a different type of problem in relation to the adequacy of the "project success" descriptor, which is summarised as follows.

The descriptor "project success" ignores the often major contributions of other strategic work to the achievement of outcomes – which also increase as we move further onwards from project delivery

- As noted earlier in this article, strategic initiative outputs comprise both outputs from both projects and *other strategic work*
- Additional *other strategic work* inputs are needed from the direct users of the outputs to convert them to outcomes. In my personal experience on organisational change projects, these inputs can be even more substantial than the original project.
- Therefore, although projects can be a very substantial component of outcomes achievement, sometimes they are a relatively small component.
- The descriptor "project success" tends to imply that project contributions are dominant. Although this is sometimes the case, very often it is not. In the latter case, "project success" is clearly an inappropriate descriptor
- This comment is applicable to the first post-delivery outcome (Level 2). It is even more relevant to the next level, which is concerned with consolidating its

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contribution to the broader organisational strategic outcomes, which entails further *other strategic work* inputs. Indeed, as already noted, Dalcher 2017 has pointed out that *other strategic work* can sometimes represent as much as 80% of the total investment in a strategic initiative. Therefore, "project success" could be an even more inappropriate descriptor on this account at the third "success level".

Overall, it can be said that the descriptor "project success" often over-states the importance of project contributions, and understates that of *other strategic work*, in the context of achieving post-project outcomes*,* and particularly those at this third level.

4. ORGANISATIONAL STRATEGY, AND THREE FOURTH LEVEL "PROJECT SUCCESS" EXAMPLES

Summarised fourth level "project success" examples, and assessment criteria

As indicated in Figure 8 below, Baccarini did not have an entry for this level.

A BASIC ORGANISATIONAL STRATEGIC MANAGEMENT FRAMEWORK					
1. Establish/ re-establish org. strategic objectives	2. Develop strategic initiative options, evaluate, choose best	3. Elaborate/consolidate strategic initiatives (SIs)	5. Achieve organisational strategic objectives.		6. Ongoing strategic reviews & responses
		4. Execute SIs [Projects & other strategic work]	Convert SI outputs to SI operational outcomes (en route to benefits)	Monitor contribution of SI operational outcomes to org. strategic objectives	*[Including provision for potential future initiatives]*

4. EXAMPLES OF FOURTH LEVEL OF "PROJECT SUCCESS", WITH ASSESSMENT CRITERIA CHECKLISTS			
Levels of project success (Dalcher 2014:Table 2.2)	**Project success** (Shenhar & Dvir 2007: Fig 2-1)	**Defining project success** (Baccarini 1999)	**Project Success Dimensions** (Shenhar et al 1997)
Level 4. Future potential *New markets, skills, opportunities*	**Preparation for future**		**Preparation for the future**
Measures for determining success (Table 2.5)	**Specific success measures**		
▪ New markets ▪ Derived products ▪ New or expanded core competency ▪ New system capability ▪ New people capability	● New market ● New product line ● New core competency ● New organisational capability		
▪ Improved processes	● New technology		
▪ New business opportunities ▪ New benefits ▪ Additional business ▪ Competitive advantage ▪ New strategy ▪ Image ▪ Recognition in new market or segment ▪ Enhanced reputation			

Figure 7. Examples of the fourth level of "project success", with assessment criteria

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Notes on the success assessment criteria ("success measures", etc.) for Level 4

It can be seen that Baccarini 1999 does not have an entry at this fourth level, and that Shenar et al 1997 do not have any specific success measures. The other two share nearly identical primary success criteria (in bold type), whilst Dalcher in particular adds other measures which are strongly related to the primary ones.

"Project success" headings for this fourth level appear to be totally inappropriate

It appears all too obvious that to describe this as a "project success" level is to stretch the bounds of credibility much too far.

SUMMARY/DISCUSSION

SUMMARY

This article first introduced an organisational strategic management context for these discussions on "project success", via an augmented six-stage organisational strategic management framework. We then introduced four examples which proposed various "levels" of "project success", three of which had four such levels. We then aligned the levels of each "project success" example, first with each other, and then with relevant (slightly adjusted) stages of the organisational strategic management framework.

We then looked in detail at each of the four "project success" levels in turn, showing sub-headings, and their nominated success criteria ("success measures")

At the first "project success" level, which directly relates to the delivery of strategic initiative and project outputs, it was concluded that the "project management success", rather than "project success", appears to be a more appropriate descriptor than "project success" for this level

The second "project success" level relates directly to the completion of the conversion of strategic initiative/project outputs to the achievement of individual strategic initiative outcomes. It was first noted that client/customer/user satisfaction success criteria are shared by all four examples, and other use-related criteria by three. Discussion on these dominant criteria led to the following conclusion.

> *The descriptor "project success" could reasonably be seen to imply that project management is responsible for achieving post-delivery outcomes. However, it is the users of project outputs who actually convert the outputs into operational outcomes, and are responsible for achieving them. Therefore "project success" does not appear to be an appropriate descriptor.*

The third "project success" level relates to the achievement of organisational strategic objectives, and the contribution of individual strategic initiatives to their achievement.

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The above conclusion for Level 2 applies even more so for Level 3. The following additional point about the appropriateness of "project success" was also made.

> *The descriptor "project success" ignores the often-major contributions of other strategic work to the achievement of outcomes – which also increase as we move further onwards from project delivery*

Finally, the fourth "success level" is concerned with unearthing potential, and preparing for, future opportunities. Hardly surprisingly, it was concluded that "project success" headings for this fourth level appear to be totally inappropriate.

DISCUSSION

In this article we have associated success with the achievement of favourable outcomes. This directly associates "project success" with "project outcomes". The latter, in particular, have been accorded much attention in the project management literature in recent years – as exampled by the following quotation from Pells 2021.

> On the back end, post project, the focus in the last ten years has been on project outcomes and benefits, ultimately the critical determinants of project success.

As I see it, a good deal of this increased focus on outcomes has not been thoroughly thought through. In two recent articles in this journal, (Stretton 2023j,k) I have commented in very substantial detail on inconsistencies and contradictions in the usage of "outcomes" in PMI's 2021 *The Standard for Project Management and A Guide to the Project Management Body of Knowledge,* 7th Edition, as now briefly summarised.

My first article noted that the Preface to PMI 2021 twice emphasised its intention to increase its focus on outcomes from project activities, rather than just on deliverables – i.e. on what I describe as "post-delivery outcomes". However, in the main body of this document, "post-delivery outcomes" comprise less than a third of the total of fifty five outcomes whose nature was clearly identifiable. The remaining "outcomes" were used to describe either pre-delivery interim operational "results", or the deliverables themselves. The inconsistencies between these and PMI's stated intention to focus on post-delivery outcomes were disconcerting, but reasonably readily rectified.

The second article looked more closely at straight-out contradictions between two set of entries in PMI 2021 about handling post-delivery outcomes. The detailed discussions on these were summarised as follows.

- 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.

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- 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 in PMI 2021.

The key role of users has been correspondingly reflected in this article on "project success" Overall, it has been contended that "project success" is not really an appropriate descriptor in most situations. If this contention is accepted, it follows that project management should be much more careful about claiming "project success", when the actual success has been achieved by the users of project outputs and beyond, and/or when substantial amounts of other strategic work have also been involved.

A POST-SCRIPT

In this article we have been looking at broader aspects of what Cooke-Davies 2004 has described as "doing the project right" – in our case broadening it to "doing the strategic initiative right". This then facilitates doing the ensuing processes "right" – i.e. successfully converting the deliverables into operational outcomes, and then ensuring that these contribute satisfactorily to the broader organisational strategic objective outcomes, and perhaps indicate new possibilities for the latter.

If we are concerned with the achievement of successful outcomes at these latter stages of the organisational strategic management processes, should we not be equally concerned with the outcomes of the first two stages? The answer must surely be a resounding "yes", because if we don't get these early outcomes "right", the later outcomes have little chance of being "right". In the project context, Cooke-Davies described this as a concern with "doing the right project".

There are some sectors in which project management does get involved in helping choose the "right" project, although the depth of such involvement is often far from clear. However, there are still many sectors where this does not happen. This represents a potential opportunity to benefit both the owner organisation, and project management, by increasing such involvement. I have written about this quite extensively in the past, but hope to revisit it in a following article, more in the context of establishing and/or re-establishing the "right" organisational strategic objectives in the first place, and then of developing alternatives and choosing the "right" strategic initiatives to facilitate achievement of the broader organisational objectives.

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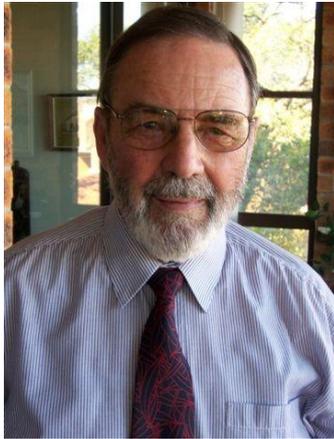
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